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## 4. Vendor Folder

### 4.1 Vendor Folder

The Vendor Folder contains all the system information on a Vendor. This information can be accessed and, in some cases, modified from the Vendor Folder. There are five (5) main tabs on the folder: Demographics, Event Log, Redemption, Notes and Food Pricing. The Demographics tab contains information such as vendor name, address, ownership type, owner information and WIC Contact. The Event Log tab displays a record of the Events and Follow-up Activities that have taken place with the vendor, from the start of the vendor application process through the end of the vendor contract. The Redemption tab displays WIC check redemption history information for the vendor. The Notes tab contains free form comments regarding the vendor. The Food Pricing Tab displays the Food Pricing Survey and Food Basket in relation to the vendor to allow the State to verify appropriate pricing by the vendor is in accordance with the WIC Program. Each tab is described in detail in the following sections. The Vendor ID and Name will appear in the title bar of the Vendor Folder. The Vendor Folder is invoked in response to the following user actions:

- Selection of a Vendor within the Vendor List and double clicking on the selected vendor as described in [Chapter 02 – Vendor List and Search](#).
- Selection of a Vendor within the Vendor List and clicking the Open Vendor Folder toolbar button as described in [Chapter 02 – Vendor List and Search](#).
- Selection of a Vendor within the Vendor List and then the Open Vendor Folder menu item from the File Menu as described in [Chapter 02 – Vendor List and Search](#).

The screenshot shows a software window titled "00073 - CAPITAL SUPER MARKET". It has a tabbed interface with "Demographics" selected. The form contains the following fields and values:

- Vendor Name:** CAPITAL SUPER MARKET
- Telephone Number:** 201-289-1336
- Email Address:** (empty)
- Fax Number:** 201-289-1388
- Vendor Address:**
  - Address:** 1231 11TH ST
  - State:** VA
  - County:** (empty)
  - City:** (empty)
  - ZIP:** 20001-0000
- Mailing Address:**
  - Address:** 1231 11TH ST
  - City:** WASHINGTON
  - State:** VA
  - ZIP:** 20001-0000
- Ownership Type:** Sole Ownership
- Owner:** (empty)
- Contact Name:**
  - Title:** OWNER
  - Salutation:** MR
  - First Name:** RICH
  - Last Name:** LEWIS
- Authorized Agent:**
  - Title:** OWNER
  - Salutation:** MR
  - First Name:** DON
  - Last Name:** JOHNSON
- Status:** ENROLLED
- Stamp Number:** 073
- Contract Start Date:** 10/01/2001
- Contract End Date:** 09/30/2005

Buttons include "Print Profile" and "Close". A vertical sidebar on the right indicates "Page 1", "Page 2", and "Page 3".

Figure 1 - Vendor Folder

## 4.1.1 Controls

This section describes the behavior of the controls on the Vendor Folder dialog.

### 4.1.1.1 Close Button

This control allows the user to close the Vendor Folder. The Close button will be enabled when the Vendor Folder is active. Characteristics of the Close button are defined in the *Consistencies*.

## 4.1.2 Processing

This section describes the process (navigation) that takes place as a result of the action taken on the Vendor Folder.

### 4.1.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text is set to "<Vendor ID> - <Vendor Name>"
- The Demographic panels are loaded with the Demographic Page 1 sub-tab on top.
- All fields display previously saved values as defined in the Data Map for this dialog

#### 4.1.2.2 Close

Upon selection of the Close button

- If the user has entered changes that have not been saved, the system will invoke a standard warning message with the text: “Do you want to save your changes to this vendor?” The message box will have Yes, No, and Cancel buttons.

Upon selection of the Yes button on the message box:

- If an entry is not made in one of the following controls
  - Vendor Name Text Box
  - Telephone Number Masked Edit Box
  - Vendor Address Text Box (Address1)
  - Vendor Address ZIP Code Masked Edit Box (ZIP)
  - Vendor Mailing Address Text Box (Address1)
  - Vendor Mailing ZIP Masked Edit Box (ZIP)
  - WIC Contact First Name Text Box (First Name)
  - WIC Contact Last Name Text Box (Last Name)
  - Authorized Agent First Name Text Box (First Name)
  - Authorized Agent Last Name Text Box (Last Name)

the system will invoke a standard error message with the text “An entry is required for the <control label>.”

- If a selection is not made in one of the following controls
  - Vendor State Dropdown (State)
  - Vendor Address County Dropdown (County)
  - Vendor Address City Dropdown (City)
  - Vendor Mailing State Dropdown (State)

the system will invoke a standard error message with the text “A selection is required in the <control label>.”

- If “Corporation” has been selected in the Ownership Type Dropdown and a value has not been entered in the following controls
  - Authorized Agent First Name Text Box (First Name)
  - Authorized Agent Last Name Text Box (Last Name)

the system will invoke a standard error message with the text “An entry is required “An entry is required for the <control name>.”

- If an incomplete entry has been entered in the following controls
  - Vendor Telephone Masked Edit Box (Telephone)
  - Vendor ZIP Masked Edit Box (ZIP)
  - Vendor Mailing ZIP Masked Edit Box (ZIP)

- the system will invoke a standard error message with the text “A complete entry is required for the <control label>.” If any part of the four-digit extension is entered, the entire extension is required.
- Upon completion of the above listed edits:
  - The system will close the vendor folder
  - The system will return to the Vendor List window
  - The Vendor List grid will be refreshed.

Upon selection of the No button on the message box:

- The system will close the Vendor Folder without saving the changes.
- The system will return to the Vendor List window

Upon selection of the Cancel button on the message box:

- The system will dismiss the message.
- The system will return to the tab of the Vendor Folder where the Close button was selected.
- Data entered on the tab of the Vendor Folder will not be lost or changed.

#### ***4.1.2.3 Data Map***

The data maps for the Vendor Folder are defined in their respective sections.

## 4.2 Demographics Tab - Page 1 Sub-tab

The Page 1 sub-tab of the Demographics tab allows the user to access general information on the Vendor, such as the vendor name, address, ownership type, owner information and WIC Contact. In some cases, the system will also allow the user to modify the information.

The screenshot shows a software window titled "00073 - CAPITAL SUPER MARKET". It features a tabbed interface with "Demographics" as the active tab. The form is organized into several sections: "Vendor Name" and "Telephone Number" at the top; "Email Address" and "Fax Number" below; "Vendor Address" with fields for Address, State (VA), County, City, and ZIP (20001-0000); "Mailing Address" with similar fields; "Ownership Type" (Sole Ownership) and "Owner" (LEWIS); "Contact Name" (OWNER, MR, RICH, LEWIS); and "Authorized Agent" (OWNER, MR, DON, JOHNSON). At the bottom, it displays "Status ENROLLED", "Stamp Number 073", "Contract Start Date 10/01/2001", and "Contract End Date 09/30/2005". A "Print Profile" button is located on the right, and a "Close" button is at the bottom right.

Figure 2 - Demographics Tab - Page 1 Sub-tab

### 4.2.1 Controls

This section describes the behavior of the controls on the Page 1 sub-tab of the Demographics tab of the Vendor Folder.

#### 4.2.1.1 Vendor Name Text Box

This control allows the user to modify or view the Vendor name. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. This control accepts entry of alphanumeric characters. The maximum size is fifty- (50) characters. All alphabetic characters will be forced to upper case and special characters are accepted in this field. The value of the control will default to the information gathered during the initial contact with the Vendor and will allow the user to change the information.

#### ***4.2.1.2 Telephone Number Masked Edit Box***

This control allows the user to modify or edit the telephone number of the Vendor. The masked edit box is enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only accept the entry of numeric digits. The mask for the box will be “###-###-####” to allow entry of the area code and seven-digit telephone number. Special characters are not accepted in this field. The value of the control will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modification to the data.

#### ***4.2.1.3 Email Address Text Box***

This control allows the user to enter or modify the email address for the vendor. The text box will be enabled when the Page 1 sub-tab is active. Characteristics for Email Address text box are defined in *Consistencies*.

#### ***4.2.1.4 Fax Number Masked Edit Box***

This control allows the user to enter or modify the fax number for the vendor. The masked edit box is enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only accept the entry of numeric digits. The mask for the box will be “(999) 999-9999” to allow entry of the area code and seven-digit fax number. Special characters are not accepted in this field.

#### ***4.2.1.5 Vendor Address Text Boxes (Address1 & Address2)***

These two controls (Address1 and Address2) allow the user to view or edit the physical address for the Vendor. The text boxes are enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. Both controls (address1 and address2) will accept entry of alphanumeric characters. The alphabetic characters will all be forced to upper case. The maximum size of each control will be fifty- (50) characters. Special characters are permitted but limited to the following: period (.), pound sign (#), dash (-), forward slash (/), and apostrophe ('). The value of both controls will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### ***4.2.1.6 Vendor State Dropdown (State)***

This control allows the user to select or view the post office state abbreviation for the physical state of the Vendor. The dropdown will be enabled when the Page 1 sub tab of the Demographics tab of the Vendor Folder is active. The drop down list will be in alphabetical order and read only. All fifty- (50) states are listed in their proper mailing abbreviation. It is filled with a list of states in the Reference Dictionary Table of the lookup database. The value will displayed the previously saved information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data. If a change is made to the State, the County dropdown is emptied.

#### ***4.2.1.7 Vendor Address County Dropdown (County)***

This dropdown allows the user to modify or view the County that corresponds to the selected State. The dropdown will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active and a selection is made in the physical State dropdown. It is filled with a list of counties within the state as defined in the COUNTY Table of the lookup database. The drop down list will be in alphabetical order and read only. The value of the control will default to the information gathered during initial contact with the Vendor and will allow the user to change the information. Upon a change to County, the City dropdown is emptied.

#### ***4.2.1.8 Vendor Address City Dropdown (City)***

This control allows the user to select or view the city in which the Vendor resides. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active and a value has been selected in the County field. It is filled with a list of cities that are located within the county selected from the County drop-down list. The sub-set list of cities is obtained from the LocalMunicipality Table. The drop down list will be in alphabetical order and read only. The value of the controls will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### ***4.2.1.9 Vendor Address ZIP Code Masked Edit Box (ZIP)***

This control allows the user to view or edit the ZIP code in which the Vendor resides. The masked edit box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will accept the entry of numeric digits only. The mask for the box will be "99999-9999" to include entry of a four digit ZIP extension, if known. If the user does not enter a four-digit extension, the extension will be populated with zeros automatically. Special characters are not accepted in this field. The value of the control will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### *4.2.1.10 Vendor Mailing Address Text Boxes (Address1 & Address2)*

These two controls (Address1 and Address2) allow the user to view or edit the mailing address for the Vendor. The text boxes are enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. Both controls (address1 and address2) will accept entry of alphanumeric characters. The alphabetic characters will all be forced to upper case. The maximum size of each control will be fifty- (50) characters. Special characters are permitted but limited to the following: period (.), pound sign (#), dash (-), forward slash (/), and apostrophe ('). The value of both controls will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### *4.2.1.11 Vendor Mailing City Text Box (City)*

This control will allow the user to view or edit the city in which the Vendor receives mail. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control will be thirty- (30) characters. All alphabetic characters will be forced to upper case. Special characters are permitted but limited to the following: period (.), dash (-), forward slash (/), pound sign (#), and apostrophe ('). This text box is free form entry. The value of the control will default to the information gathered during initial contact with the Vendor and will allow the user to change the information.

#### *4.2.1.12 Vendor Mailing State Dropdown (State)*

This control allows the user to select or view the post office state abbreviation for which the Vendor receives mail. The dropdown will be enabled when the Page 1 sub tab of the Demographics tab of the Vendor Folder is active. The drop down list will be in alphabetical order and read only. All fifty- (50) states are listed in their proper mailing abbreviation. It is filled with a list of states as defined in the Reference Dictionary Table of the lookup database. The value of both controls will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### *4.2.1.13 Vendor Mailing ZIP Masked Edit Box (ZIP)*

This control allows the user to view or edit the ZIP code in which the Vendor receives mail. The masked edit box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will accept the entry of numeric digits only. The mask for the box will be "99999-9999" to include entry of a four digit ZIP extension, if known. If the user does not enter a four-digit extension, the extension will be populated with zeros automatically. Special characters are not accepted in this field. The value of both controls will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### ***4.2.1.14 Ownership Type Text Box***

This control allows the user to view the Vendor ownership type. The text box will be visible when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. This field is read only and disabled. The value of the control will default to the information gathered during the initial contact with the Vendor.

#### ***4.2.1.15 Owner Dropdown***

This control allows the user to view or edit the Owner(s) of the Vendor. The dropdown will be visible when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. It will be a read only drop down list. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity; otherwise the field will be blank.

#### ***4.2.1.16 Edit Button***

This control allows the user to modify the ownership information for the Vendor. The Edit button will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active and if there is an entry in the Owner dropdown. It will have a mnemonic of "E".

#### ***4.2.1.17 WIC Contact Title Text Box (Title)***

This control allows the user to modify or view the title for the WIC Contact Person for the Vendor. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control is twenty (20) characters. All alphabetic characters will be forced to uppercase. Special characters are permitted but limited to the following: comma (,), period (.), dash (-), forward slash (/), and apostrophe ('). The value of the control will default to the information gathered during initial contact with the Vendor and will allow the user to change the information.

#### ***4.2.1.18 WIC Contact Salutation Text Box (Salutation)***

This control allows the user to modify or view the salutation for the WIC Contact Person of the Vendor. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control may vary according to your state. All alphabetic characters will be forced to uppercase. Special characters are permitted but limited to the following: comma (,), period (.), dash (-), forward slash (/), and apostrophe ('). The value of the control will default to the information gathered during initial contact with the Vendor and will allow the user to change the information.

#### ***4.2.1.19 WIC Contact First Name Text Box (First Name)***

This control allows the user to modify or view the first name of the WIC Contact Person for the Vendor. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control will be twenty (20) characters. All alphabetic characters will be forced to upper case. Special characters are permitted in this text box, but are limited to apostrophe ('), comma (,), period (.), and dash (-). The value of both controls will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### ***4.2.1.20 WIC Contact Last Name Text Box (Last Name)***

This control allows the user to modify or view the last name of the WIC Contact Person for the Vendor. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control will be twenty-five (25) characters. All alphabetic characters will be forced to upper case. Special characters are permitted in this text box, but are limited to apostrophe ('), comma (,), period (.), and dash (-). The value of both controls will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### ***4.2.1.21 Authorized Agent Title Text Box (Title)***

This control allows the user to edit the title for the Authorized Agent for the Vendor. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control is twenty (20) characters. All alphabetic characters will be forced to uppercase. Special characters are permitted but limited to the following: comma (,), period (.), dash (-), forward slash (/), and apostrophe ('). The value of the control will default to the information gathered during initial contact with the Vendor and will allow the user to change the information.

#### ***4.2.1.22 Authorized Agent Salutation Text Box (Salutation)***

This control allows the user to edit the salutation for the Authorized Agent for the Vendor. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control may vary according to your state. All alphabetic characters will be forced to uppercase. Special characters are permitted but limited to the following: comma (,), period (.), dash (-), forward slash (/), and apostrophe ('). The value of the control will default to the information gathered during initial contact with the Vendor and will allow the user to change the information.

#### ***4.2.1.23 Authorized Agent First Name Text Box (First Name)***

This control allows the user to edit the first name of the Authorized Agent for the Vendor. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control will be twenty (20) characters. All alphabetic characters will be forced to uppercase. Special characters are permitted in this text box, but are limited to apostrophe ('), comma (,), period (.), and dash (-). The value of the control will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### ***4.2.1.24 Authorized Agent Last Name Text Box (Last Name)***

This control allows the user to edit the last name of the Authorized Agent for the Vendor. The text box will be enabled when the Page 1 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control will be twenty-five (25) characters. All alphabetic characters will be forced to upper case. Special characters are permitted in this text box, but are limited to apostrophe ('), comma (,), period (.), and dash (-). The value of both controls will default to the information gathered during the application process for the Vendor and will allow the user to make changes/modifications to the data.

#### ***4.2.1.25 Status Label and Value***

This text label and value allows the user to view the current status of the Vendor. The value will be set to the current status of the Vendor. The text will display in the inverse color of the form and is read only.

#### ***4.2.1.26 Contract Start Date Text Label and Value***

This text label and value allows the user to view the most recent contract start date for the vendor. The value label will be set to the Vendor.ContractStartDate. The date will display in the inverse color of the form and is read only. The value is in the format of MM/YY/CCYY.

#### ***4.2.1.27 Contract End Date Text Label and Value***

This text label and value allows the user to view the most recent contract end date for the vendor. The value will be set to the Vendor.ContractEndDate. The date will display in the inverse color of the form and is read only. The value is in the format of MM/YY/CCYY.

#### ***4.2.1.28 Stamp Number Text Label and Value***

This text label and value allows the user to view the primary stamp number assigned to the Vendor. The value will be set to the Vendor.StampNumber. The number will display in the inverse color of the form and is read only.

#### ***4.2.1.29 Print Profile Button***

This control allows the user to instruct the system to generate a printout of the Vendor Profile report as described in Chapter 19 - Vendor Reports. The button will be visible and enabled when the Page 1 Sub-tab of the Demographics tab is active in the Vendor Folder. It will have a mnemonic of "P".

### **4.2.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Page 1 sub-tab of the Demographics tab of the Vendor Folder.

#### ***4.2.2.1 Initializing the Interface***

Upon the initial display of the Vendor folder or selection of the Page 1 sub-tab:

- The Demographics tab, Page 1 Sub-tab will be displayed 'on-top'.
- All fields display previously saved values as defined in the Data Map for this dialog
- If the Vendor ownership type is Commissary, the Edit button will be disabled.
- If the Vendor ownership type is Sole Ownership, Partnership or Corporation, the Edit button will be enabled.

#### ***4.2.2.2 Print Profile***

Upon selection of the Print Profile button:

- The system will invoke the Generate Vendor Profile Report dialog as defined in Vendor Reports.

#### ***4.2.2.3 Edit Ownership/Corporation***

Upon selection of the Edit button

- If the Vendor ownership type is Sole Ownership or Partnership, the system will invoke the Owner Information dialog as described in [Chapter 10 – Update Vendor Information](#).
- If the Vendor ownership type is Corporation, the system will invoke the Corporate Parent dialog as described in [Chapter 10 – Update Vendor Information](#).

#### ***4.2.2.4 Edits (Switching Tab)***

Upon a change in data and selection of any of the following tab/sub-tabs:

- Demographics Page 2 sub-tab
- Demographics Page 3 sub-tab
- Notes tab
- Event Log tab
- Redemption tab

- Food Pricing tab

the system will invoke a standard error message with the text “Do you want to save your changes to this vendor?” The message box will have Yes, No, and Cancel buttons. If the user selects “No” the system will discard any changes and proceed to the requested dialog. If the user selects “Cancel” the focus will remain on the Vendor Folder Demographics Page 1 sub-tab. If the user selects “Yes” the system will invoke the following Edits:

- If an entry is not made in one of the following controls
  - Vendor Name Text Box
  - Telephone Number Masked Edit Box
  - Vendor Address Text Box (Address1)
  - Vendor Address ZIP Code Masked Edit Box (ZIP)
  - Vendor Mailing Address Text Box (Address1)
  - Vendor Mailing ZIP Masked Edit Box (ZIP)
  - WIC Contact First Name Text Box (First Name)
  - WIC Contact Last Name Text Box (Last Name)

the system will invoke a standard error message with the text “An entry is required for the <control label>.”

- If a selection is not made in one of the following controls
  - Vendor State Dropdown (State)
  - Vendor Address County Dropdown (County)
  - Vendor Address City Dropdown (City)
  - Vendor Mailing State Dropdown (State)

the system will invoke a standard error message with the text “A selection is required in the <control label>.”

- If “Corporation” has been selected in the Ownership Type Dropdown and a value has not been entered in the following controls
  - Authorized Agent First Name Text Box (First Name)
  - Authorized Agent Last Name Text Box (Last Name)

the system will invoke a standard error message with the text “An entry is required for the <control name>.”

- If an incomplete entry has been entered in the following controls
  - Vendor Telephone Number Masked Edit Box
  - Vendor Fax Number Masked Edit Box
  - Vendor ZIP Masked Edit Box (ZIP)
  - Vendor Mailing ZIP Masked Edit Box (ZIP)

the system will invoke a standard error message with the text “A complete entry is required for the <control label>.” If any part of the four-digit extension on the ZIP codes is entered, the entire extension is required.

- If the value entered in the Email Address text box does not follow the characteristics defined in *Consistencies*, the system will invoke a standard error message with the text, “Email Address is invalid.”
- If the status of the vendor has been changed, the status change will display for the selected Vendor upon returning to the Vendor List.

#### 4.2.2.5 Saving the Data

Upon completion of the above listed edits:

- The system will save the data to the database as defined in the Data Map below.
- The system will advance to selected tab/sub-tab

#### 4.2.2.6 Data Map

Control Label	Entity	Attribute
Vendor ID (in title bar)	VENDOR	VendorID
Vendor Name	VENDOR	TradeName
Telephone Number	VENDOR	Telephone
Email Address	VENDOR	Email
Fax Number	VENDOR	FaxNbr
Vender Address: Address	VENDOR	PhysicalAddress1 PhysicalAddress2
Vendor Address: County	VENDOR	County
Vendor Address: City	VENDOR	PhysicalCity
Vendor Address: State	VENDOR	PhysicalState
Vendor Address: ZIP	VENDOR	PhysicalZip
Mailing Address: Address	VENDOR	MailingAddress1 MailingAddress2
Mailing Address: City	VENDOR	MailingCity

Mailing Address: State	VENDOR	MailingState
Mailing Address: ZIP	VENDOR	MailingZip
Store Type	StoreType – codes/defined VENDOR	StoreTypeId StoreTypeId
Ownership Type	ReferenceDictionary – codes/defined VENDOR	OwnerType Ownershipstructure
Corporate Parent	CORPORATEPARENT – codes/defined VENDOR	CorporateParentID
Owner	OWNER	FirstName MI LastName
Peer Group	PEERGROUP -- codes/defined VENDOR	PEERGROUP
Contact Name: Title	VENDOR	WICContactTitle
Contact Name: Salutation	VENDOR	WICContactSalutation
Contact Name: First Name	VENDOR	WICContactFirstName
Contact Name: Last Name	VENDOR	WICContactLastName
Authorized Agent: Title	VENDOR	AuthorizedAgentTitle
Authorized Agent: Salutation	VENDOR	AuthorizedAgentSalutation
Authorized Agent: First Name	VENDOR	AuthorizedAgentFirstName
Authorized Agent: Last Name	VENDOR	AuthorizedAgentLastName
Status	VENDOR/ ReferenceDictionaries	CurrentStatus/ Status

ContractStartDate	VENDOR	ContractStartDate
ContractEndDate	VENDOR	ContractEndDate
Stamp Number	VENDOR	StampNumber

### 4.3 Demographics Tab - Page 2 Sub-tab

The Demographics tab - Page 2 sub-tab allows the user to access the Store Information, which is used to maintain the vendor's store operations and service information. In some cases, the system will also allow the user to modify the information.

**00073 - Capital Super Market**

Demographics | Redemption | Event Log | Notes | Food Pricing

StoreType: Franchise (dropdown)

☒ Scanners ☐ EBT  
☐ Scan for WIC Items

**Measurements**  
 Square Footage: 1234567  
 Cash Registers: 23  
 Cashiers: 123

**Annual Sales**  
 WIC: \$1,688,333.56  
 Non-WIC: \$1,955,234.44  
 Total: \$3,643,568.00  
 46% WIC

**Business Hours**  
☒ Open at least 8 Hours a Day 6 Days a Week

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
OPEN	08:00	08:00	08:00	08:00	08:00	08:00	
CLOSED	10:00	10:00	10:00	10:00	10:00	10:00	

State Sales Tax Number: 4567890  
 Federal ID Number: 09-8765432  
 Health ID: A33B2

**Food Stamp Authorization**  
☐ Pending Authorization Date: 09/14/2004  
 Food Stamp Number:

**Bank Information**  
 Bank Name: BANK NAME  
 Bank Transit Number: 1234567890  
 Account Number: 8765432345

**Kosher Foods**  
☒ Yes - Some  
☐ Yes - Primarily Kosher  
☐ No

Close

Figure 3 - Demographics Tab - Page 2 Sub-tab

#### 4.3.1 Controls

This section describes the behavior of the controls on the Page 2 sub-tab of the Demographics tab of the Vendor Folder.

##### 4.3.1.1 Store Type Dropdown

This control allows the user to modify or view the store type of the Vendor. The dropdown will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. It is filled with a list of store types from the StoreType Table. The drop down list will be read only. The value of the control will default to the information gathered during the initial contact with the Vendor and will allow the user to change the information.

#### ***4.3.1.2 Scanners Check Box***

This control allows the user to indicate that the Vendor has scanners. The check box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank. When the Scanners check box is selected, the Scan for WIC Items check box will be enabled. When the Scanners check box is deselected, the Scan for WIC Items check box will be disabled and cleared.

#### ***4.3.1.3 Scan for WIC Items Check Box***

This control allows the user to indicate that the store scanners identify WIC items separately. The check box will be enabled when the Scanners check box is selected. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank. When the Scanners check box is selected, the Scan for WIC Items check box will be enabled. When the Scanners check box is deselected, the Scan for WIC Items check box will be disabled and cleared.

#### ***4.3.1.4 EBT Item Check Box***

This control allows the user to indicate if EBT is applicable to the Vendor. The check box will be enabled when the Page 2 sub-tab of the Demographics tab in the Vendor Folder is active. The value of the control will default to checked or unchecked, depending on what was previously saved through the Application Wizard Follow-up Activity process. The user will be allowed to change the value if necessary. Checked indicates Yes, EBT; Unchecked indicates No, EBT.

#### ***4.3.1.5 Square Footage Masked Edit Box***

This control allows the user to edit the square footage of the Vendor store building. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The maximum size of this control will be seven (7) characters. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.3.1.6 Cash Registers Masked Edit Box***

This control allows the user to edit the number of cash registers the Vendor has in the store. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The maximum size of this control will be two (2) characters. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will default to zero (0).

#### ***4.3.1.7 Cashiers Masked Edit Box***

This control allows the user to edit the number of cashiers that are employed at the Vendor store. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The maximum size of this control will be three (3) characters. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

The Total masked edit box will be refreshed when this field has been valued or modified.

#### ***4.3.1.8 Annual Sales - WIC Masked Edit Box (WIC)***

This control allows the user to enter or modify the Annual WIC Sales for the Vendor. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The mask for the box will be "\$999999999.99" and will accept maximum size of eleven (11) characters. The entry will be formatted to accept up to nine (9) whole numbers and two (2) decimals. The value of the control will display the previously saved value as defined in the data map for this sub-tab, otherwise it will be blank. The Total masked edit box and WIC percent value label will be refreshed when this field has been valued or modified.

#### ***4.3.1.9 Annual Sales – Non-WIC Masked Edit Box (Non-WIC)***

This control allows the user to enter or modify the Annual Non-WIC Sales for the Vendor. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The mask for the box will be “\$999999999.99” and will accept maximum size of eleven (11) characters. The entry will be formatted to accept up to nine (9) whole numbers and two (2) decimals. The value of the control will display the previously saved value as defined in the data map for this sub-tab, otherwise it will be blank. The Total masked edit box and WIC percent value label will be refreshed when this field has been valued or modified.

#### ***4.3.1.10 Annual Sales - Total Masked Edit Box (Total)***

This control allows the user to view the total sales for the Vendor. The masked edit box will be enabled and read-only when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The value of the control will be a calculated value from the sum of the WIC and Non-WIC masked edit box values. This field will be refreshed when the values of the WIC or Non-WIC values are entered or modified.

#### ***4.3.1.11 Annual Sales – WIC Percent Text and Value Label***

This text label and value allows the user to view the percentage of the Annual WIC sales. The label will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. It will display the Percentage of the WIC sales for the vendor. The value will be displayed in the inverse color of the dialog and will be read only. The value will be calculated by taking the WIC Sales divided by the Total Sales multiplying by 100 and rounding to the nearest whole number. It will display as ‘XX%’

#### ***4.3.1.12 Open at Least 8 Hours a Day 6 Days a Week Check Box***

This control allows the user to indicate if the Vendor is open at least 6 days a week, and at least 8 hours each day. The check box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank. When selected, the Business Hours grid will be disabled.

#### ***4.3.1.13 Business Hours Grid***

This control allows the user to edit the days and the hours the Vendor store is open for business. The grid will be enabled when the Open At Least 8 Hours a Day 6 Days a Week check box is not selected. The grid will consist of a column for each day of the week, with two rows per column to indicate the Open and Close time for each day. The format for the Open and Close rows will be HH:MM (where HH is the two-digit hour and MM is the two digit minute) and will only accept numbers. Upon beginning the entry of the time, the system automatically formats the entry and defaults to AM. If the time entry is incomplete, the system will automatically pad the field with zeros. The user can toggle the meridian (AM / PM) to assign the appropriate time of day by pressing the A (AM) or P (PM) keys. Navigation through the grid is accomplished through the use of the arrow keys). The values in the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank. Valid clock times may be entered (01 through 12 for hours and 00 through 59 for minutes).

#### ***4.3.1.14 State Sales Tax Number Masked Edit Box***

This control allows the user to edit the State Sales Tax number of the Vendor. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The maximum size of this control will be fifteen (15) characters. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change, but not blank out, the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.3.1.15 Federal ID Number Masked Edit Box***

This control allows the user to edit the Federal Identifier number of the Vendor. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The maximum size of this control will be nine (9) characters. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change, but not blank out, the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.3.1.16 Health ID Text Box***

This control allows the user to enter the regional Health ID for the vendor. The text box will be enabled when the Page 2 sub-tab of the Demographics tab is active in the Vendor Folder. This control will accept entry of alphanumeric characters, with a maximum size of five (5) characters. All alphabetic characters will be forced to uppercase. Special characters are not permitted in this field. The control will initially be blank. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information.

#### ***4.3.1.17 Pending Check Box***

This control allows the user to indicate that the Food Stamp Authorization number is pending approval. The check box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank. When selected, the Authorization Date and Food Stamp Number controls will be disabled.

#### ***4.3.1.18 Authorization Date Masked Edit Box***

This control allows the user to edit the date the Food Stamp number was given to the Vendor. The masked edit box will be enabled when the pending check box is deselected (unchecked). The masked edit box accepts entry of numeric digits. The mask on the box will be "99/99/9999" to accept a date with a four-digit year. The string entered must be a valid date in the format of MM/DD/CCYY or MM/DD/YY. If the latter the system will automatically add the century to the year. When working in "add" mode, the entry field will initially be blank unless an entry was previously made on the Demographics tab sub tab Page 1 of the Vendor Folder. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.3.1.19 Food Stamp Number Masked Edit Box***

This control allows the user to edit the Food Stamp Authorization number of the Vendor. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active and the pending checkbox is deselected (unchecked). The masked edit box will only allow the entry of numeric digits. The maximum allowed will be fifteen (15) digits. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.3.1.20 Bank Name Text Box***

This control allows the user to edit the name of the bank used by the Vendor. The text box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control will be fifty- (50) characters. All alphabetic characters will be forced to upper case. Special characters are permitted but limited the ampersand (&) only. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.3.1.21 Bank Transit Number Masked Edit Box***

This control allows the user to edit the transit number of the bank used by the Vendor. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The maximum size of this control will be ten (10) characters. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.3.1.22 Account Number Masked Edit Box***

This control allows the user to edit the Vendor account number at the bank used by the Vendor. The masked edit box will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. The masked edit box will only allow the entry of numeric digits. The maximum size of this control will be ten (10) characters. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.3.1.23 Kosher Foods Radio Button Group***

This radio button group allows the user to indicate that the Vendor sells Kosher foods and how much of their sales are from Kosher food sales. The radio buttons will be enabled when the Page 2 sub-tab of the Demographics tab of the Vendor Folder is active. There will be three (3) options:

- Yes - Some
- Yes - Primarily Kosher
- No

The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the 'Yes – Some' radio button will be the default selection.

### 4.3.2 Processing

This section describes the processes (navigation) that take place as a result of the actions taken on the Page 2 sub-tab of the Demographics tab of the Vendor Folder.

#### 4.3.2.1 *Initializing the Interface*

Upon selection of the Page 2 sub-tab:

- The Demographics tab, Page 2 Sub-tab will be displayed 'on-top'.
- All fields display previously saved values as defined in the Data Map for this dialog

#### 4.3.2.2 *Edits (Switching Tab)*

Upon a change in data and selection of any of the following tab/sub-tabs:

- Demographics Page 1 sub-tab
- Demographics Page 3 sub-tab
- Notes tab
- Event Log tab
- Redemption tab
- Food Pricing tab

the system will invoke a standard error message with the text "Do you want to save your changes to this vendor?" The message box will have Yes, No, and Cancel buttons. If the user selects "No" the system will discard any changes and proceed to the requested tab. If the user selects "Cancel" the focus will remain on the Vendor Folder Demographics Page 2 sub-tab. If the user selects "Yes" the system will perform the following edits:

- If an entry is not made in one of the following controls
  - Cash Registers Masked Edit Box
  - State Sales Tax Number Masked Edit Box
  - Federal ID Number Masked Edit Box

the system will invoke a standard error message with the text "An entry is required for the <control label>."

- If an incomplete entry has been entered in the following control
  - Federal ID Number Masked Edit Box

the system will invoke a standard error message with the text "A complete entry is required for the <control label>."

- If Open time is not earlier than the Close time in the Business Hours Grid, the system will invoke a standard error message with the text “The Open time must be earlier than the Close time. Please change the time information or change the AM/PM selection.”
- If entry of the open or closed time is made in the Business Hours Grid, then both the open and closed time must be entered. If only one is entered the system will invoke a standard error message with the text, “An open and close time is required if either are entered. Please correct your entry for {Day of Week}.”

#### **4.3.2.3 Saving the Data**

Upon completion of the above listed edits:

- The system will save the data to the database as defined in the Data Map below.
- The system will advance to the selected tab/sub-tab.

#### **4.3.2.4 Data Map**

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>
Store Type	VENDOR	StoreTypeId
Scanners	VENDOR	ElectronicScanners
EBT	VENDOR	EBT
Scan for WIC Items	VENDOR	RecognizeWICFoods
Square footage	VENDOR	SquareFootage
Cash Registers	VENDOR	CheckOutRegisters
Cashiers	VENDOR	Cashiers
WIC	VENDOR	AnnualWICFoodSales
Non-WIC	VENDOR	AnnualNonWICFoodSales
Total	VENDOR	AnnualFoodSales
%	Calculated Value	Calculated Value

Business Hours: Open at least 8 Hours a Day 6 Days a Week	VENDOR	OpenRequiredHours
Business Hours: grid	StoreHours	MondayOpen MondayClose TuesdayOpen TuesdayClose WednesdayOpen Wednesday Close Thursday Open Thursday Close Friday Open Friday Close SaturdayOpen SaturdayClose SundayOpen SundayClose
State Sales Tax Number	VENDOR	StateSalesTaxNumber
Federal ID Number	VENDOR	FederalTaxNumber
Health ID	VENDOR	HealthID
Food Stamp Authorization: Pending	VENDOR	
Food Stamp Authorization: Authorization Date	VENDOR	AuthorizationDate
Food Stamp Authorization: Food Stamp Number	VENDOR	ApplicationPending
Bank Name	VENDOR	BankName
Bank Transit Number	VENDOR	TransitNumber

Account Number	VENDOR	AccountNumber
Kosher Foods	VENDOR	KosherFoods

#### 4.4 Demographics Tab - Page 3 Sub-tab

The Demographics tab - Page 3 sub-tab allows the user view information about the store service and suppliers and additional information for the Vendor. In some cases, the system will also allow the user to modify the information.

The screenshot displays a software window titled "00073 - CAPITAL SUPER MARKET". Inside, there are several tabs: "Demographics", "Redemption", "Event Log", "Notes", and "Food Pricing". The "Demographics" tab is active, and within it, "Page 3" is selected. The form contains the following elements:

- Primary Grocery Wholesaler:** A dropdown menu with an "Add..." button and an "Edit..." button.
- Milk or Pharmacy Wholesaler:** A dropdown menu with an "Add..." button and an "Edit..." button.
- Licensed Formula Wholesaler:** A dropdown menu with an "Add..." button and an "Edit..." button.
- Peer Group:** A dropdown menu.
- Staff Member Assigned:** A dropdown menu.
- Shared Local Clinics:** A list box containing "000 - CLINIC", "002 - CLINIC", "003 - CLINIC", and "005 - CLINIC".
- Other WIC Programs Served:** A list box containing "Oklahoma WIC Program", "Muskogee Creek Nation WIC Program", and "Wichita, Caddo, Delaware (WCD) WIC Program".
- Directions to the Store:** A large text area for input.

A "Close" button is located at the bottom right of the window.

Figure 4 - Demographics Tab - Page 3 Sub-tab

##### 4.4.1 Controls

This section describes the behavior of the controls on the Page 3 sub-tab of the Demographics tab of the Vendor Folder.

###### 4.4.1.1 Primary Grocery Wholesaler Dropdown

This control allows the user to select the primary grocery wholesaler for the Vendor. The dropdown will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. This will be a read only drop down list. It is filled with a list of grocery wholesalers from the GrocerySupplier entity. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.4.1.2 Add Primary Grocery Wholesaler Button (Add)***

This control allows the user to enter a new grocery wholesaler. The Add primary grocery wholesaler button will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. It will have a mnemonic of "A".

#### ***4.4.1.3 Edit Primary Grocery Wholesaler Button (Edit)***

This control allows the user to edit the grocery wholesaler information. The Edit primary grocery wholesaler button will be enabled when an item is selected in the Primary Grocery Wholesaler dropdown. It will have a mnemonic of "E".

#### ***4.4.1.4 Milk or Pharmacy Wholesaler Dropdown***

This control allows the user to select the milk or pharmacy wholesaler for the Vendor. The dropdown will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. If the State Business Rule 'PHARMACYWHOLESALER' = 'Y', the entries are known as pharmacy wholesalers. If the State Business Rule 'PHARMACYWHOLESALER' = 'N', the entries are known as milk wholesalers. This will be a read only drop down list. It is filled with a list of wholesalers from the Wholesaler entity in alphabetical order. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.4.1.5 Add Milk or Pharmacy Wholesaler Button (Add)***

This control allows the user to enter a new milk or pharmacy wholesaler. The Add milk or pharmacy wholesaler button will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. It will have a mnemonic of "D".

#### ***4.4.1.6 Edit Milk or Pharmacy Wholesaler Button (Edit)***

This control allows the user to edit the milk or pharmacy wholesaler information. The Edit milk or Edit pharmacy wholesaler button will be enabled when an item is selected in the Milk or Pharmacy Wholesaler dropdown. It will have a mnemonic of "T".

#### *4.4.1.7 Licensed Formula Wholesaler Dropdown*

This control allows the user to select or view the licensed formula wholesaler for the Vendor. The dropdown will be enabled when the state business rule 'FORMULAWHOLESALERENABLED' = 'Y' and the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. This will be a read only drop down list. It is filled with a list of licensed formula wholesalers from the FORMULAWHOLESALER entity and will be displayed in alphabetical order. When working in "add" mode, the field will initially be blank unless a selection was previously made on the Demographics tab sub-tab Page 3 of the Vendor Folder. When working in "view" mode, the control is populated with the previously saved selection.

#### *4.4.1.8 Add Licensed Formula Wholesaler Button (Add)*

This control allows the user to enter a new licensed formula wholesaler. The Add button will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. It will have a mnemonic of "A".

#### *4.4.1.9 Edit Licensed Formula Wholesaler Button (Edit)*

This control allows the user to edit the licensed formula wholesaler information. The Edit button will be enabled when an item is selected in the Licensed Formula Wholesaler dropdown. It will be disabled when no item is selected in the Licensed Formula Wholesaler dropdown. It will have a mnemonic of "E".

#### *4.4.1.10 Peer Group Dropdown*

This control allows the user to select the peer group for the Vendor. The dropdown will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. It is a read only drop down list. It is filled with a list of peer groups from the PEERGROU Table. The value of the control will default to the information gathered during initial contact with the Vendor and will allow the user to change the information.

#### *4.4.1.11 Staff Member Assigned Dropdown*

This control allows the user to select the staff member who will be assigned to the Vendor. The dropdown will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. It is a read only drop down list. It is filled with a list of staff members from the USERPROFILE entity. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

#### ***4.4.1.12 Primary Agency Dropdown***

This control allows the user to select the primary agency for the Vendor. The dropdown will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active and the state business rule "PRIMARYAGENCY" = 'Y'. It will be a read only drop down list. It is filled with a list of agencies from the AGENCIES entity. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank. If the state business rule "PRIMARYAGENCY" = 'N' this control will not be visible.

#### ***4.4.1.13 Shared Agencies List Box***

This control allows the user to select the shared (secondary) agencies of the Vendor. The list box will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active and the state business rule "PRIMARYAGENCY" = 'Y'. It will be a multi-select list box. It is filled with a list of agencies from the AGENCIES entity. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank. If the state business rule "PRIMARYAGENCY" = 'N' this control will be replaced with Shared Local Clinics list box. When enabled, the Shared Agencies list box does not allow selecting the same Agency selected in the Primary agency dropdown.

#### ***4.4.1.14 Shared Local Clinics List Box***

This control allows the user to select the shared local clinics of the Vendor. The list box will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active and the state business rule "PRIMARYAGENCY" = 'N'. It will be a multi-select list box. It is filled with a list of clinics from the ServiceSite entity. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, no clinic will be selected. If the state business rule "PRIMARYAGENCY" = 'Y' this control will be replaced with Shared Agencies list box.

#### ***4.4.1.15 Other WIC Programs Served List Box***

This control allows the user to select the other WIC programs that the Vendor serves. The list box will be displayed if the state business rule 'OTHERWICPROGRAMSSERVED' = 'Y'. The list box will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. It will be a multi-select list box. It is filled with a list of other WIC programs from the OtherWICProgram entity. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, no other WIC program will be selected.

#### ***4.4.1.16 Directions to the Store Text Box***

This control allows the user to enter directions to the Vendor location. The text box will be enabled when the Page 3 sub-tab of the Demographics tab of the Vendor Folder is active. The control accepts entry of alphanumeric characters. The maximum size of the control will be four thousand (4,000) characters. All alphabetic characters will appear in mixed case (upper and lower case) depending on how entry was made. As text is entered in this control, the information will word wrap to accommodate multiple lines of text. Special characters are accepted in this text box. The value of the control will default to the information recorded through the Application Wizard Follow-up Activity and will allow the user to change the information. If the Application Wizard Follow-up Activity has not been completed, the field will be blank.

### **4.4.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Page 3 sub-tab of the Demographics tab of the Vendor Folder.

#### ***4.4.2.1 Initializing the Interface***

Upon selection of the Page 3 sub-tab:

- The Demographics tab, Page 3 sub-tab will be displayed 'on-top'.
- The system will determine if the value for the state business rule "PRIMARYAGENCY". If the value is set to 'N' the Shared Local Clinics list box will be visible and the Primary Agency dropdown and the Shared Agency list box will be hidden. If the value is set to 'Y' the Primary Agency dropdown and the Shared Agency list box will be visible and the Shared Local Clinics list box will be hidden.
- All fields display previously saved values as defined in the Data Map for this dialog

#### *4.4.2.2 Add Primary Grocery Wholesaler*

Upon selection of the Add Primary Grocery Wholesaler button, the system will invoke the Add Primary Grocery Wholesaler dialog as described in [Chapter 10 – Update Vendor Information](#).

#### *4.4.2.3 Edit Primary Grocery Wholesaler*

Upon selection of the Edit Primary Grocery Wholesaler button, the system will invoke the Edit Primary Grocery Wholesaler dialog as described in [Chapter 10 – Update Vendor Information](#).

#### *4.4.2.4 Add Milk or Pharmacy Wholesaler*

Upon selection of the Add Milk or Pharmacy Wholesaler button, the system will invoke the Add Milk or Pharmacy Wholesaler dialog as described in [Chapter 10 – Update Vendor Information](#).

#### *4.4.2.5 Edit Milk or Pharmacy Wholesaler*

Upon selection of the Edit Milk or Pharmacy Wholesaler button, the system will invoke the Edit Milk or Pharmacy Wholesaler dialog as described in [Chapter 10 – Update Vendor Information](#).

#### *4.4.2.6 Add Licensed Formula Wholesaler*

Upon selection of the Add Licensed Formula Wholesaler button, the system will invoke the Add Licensed Formula Wholesaler dialog described in [Chapter 10 – Update Vendor Information](#).

#### *4.4.2.7 Edit Licensed Formula Wholesaler*

Upon selection of the Edit Licensed Formula Wholesaler button, the system will invoke the Edit Licensed Formula Wholesaler dialog as described in [Chapter 10 – Update Vendor Information](#).

#### *4.4.2.8 Edits (Switching tab)*

Upon a change in data and selection of any of the following tab/sub-tabs:

- Demographics Page 1 sub-tab
- Demographics Page 2 sub-tab
- Notes tab
- Event Log tab
- Redemption tab
- Food Pricing tab

the system will invoke a standard error message with the text "Do you want to save your changes to this vendor?" The message box will have Yes, No, and Cancel buttons. If the user selects "No" the system will discard any changes and proceed to the requested dialog. If the user selects "Cancel" the focus will remain on the Vendor Folder Demographics Page 3 sub-tab. If the user selects "Yes" the system will perform the following edits:

- If an entry is not made in one of the following controls
  - Cash Registers
  - State Sales Tax Number Masked Edit Box
  - Federal ID Number Masked Edit Box

the system will invoke a standard error message with the text “An entry is required for the <control label>.”

- If a selection is not made in on of the following controls
  - Peer Group Dropdown
  - Primary Agency Dropdown (if visible)
  - Licensed Formula Wholesaler Dropdown (required when the ‘FORMULAWHOLESALERENABLED’ = ‘Y’)

the system will invoke a standard error message with the text “A selection is required in the <control label>.”

#### **4.4.2.9 Saving the Data**

Upon completion of the above listed edits:

- The system will save the data to the database as defined in the Data Map below.
- If the “PRIMARYAGENCY” value is set to ‘N’, the system will automatically save the value of the single agency listed in the Agency table to the VendorLAAssociation table for this vendor and the Primary flag will be set to ‘Y’.
- The system will advance to the selected tab/sub-tab.

#### **4.4.2.10 Data Map**

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>	<b>Business Rule</b>
Primary Grocery Wholesaler	VENDOR	GrocerySupplierID	
Milk or Pharmacy Wholesaler	VENDOR	WholesalerID	Y
Licensed Formula Wholesaler	VENDOR	FormulaWholesalerID	Y
Peer Group	VENDOR	PeerGroup	
Staff Member Assigned	VENDOR	UserID	

Primary Agency	VendorLAAssociation	AgencyID  (note Primary flag is set to 'Y')	Y
Shared Agencies	VendorLAAssociation	AgencyID  (note: Primary flag is set to 'N')	Y
Shared Local Clinics	VendorSSAssociation	ServiceSiteID	Y
Other WIC Programs Served	OtherWICProgramsServed	VendorID/ OtherWICProgramID	Y
Directions to the Store	VENDOR	DIRECTIONS	

## **4.5 Event Log Tab**

The Vendor Management system is designed to track and facilitate the effective management of vendor activity by the State office vendor management staff. Information is stored for authorizations, training, ongoing monitoring contacts, correspondences, and redemption history. A key concept in the design of the system is the use of the terms “Event” and “Follow-up Activities”.

Events are triggering events that are recorded in the system. Examples of events are: complaints, compliance buys, and termination. Events in the Vendor Management system are:

- Applicant
- Complaint
- Compliance Buy
- Renewal
- Termination
- Routine Monitoring Visit
- Stamp Replacement
- New Vendor Authorization
- Letter Sent
- Sanction Assessed
- Approved Checks
- Approved Checks Adjusted Pay Amount
- Checks Not Approved
- Hearing
- Annual Training Scheduled
- Interactive Training Scheduled
- New Vendor Training Scheduled
- Special Training
- Terminate Stamp
- Telephone Call

Follow-up activities are actions that are taken in response to a triggering event. Any follow-up activity can be associated with an event. For example, receiving a complaint about a vendor may trigger follow-up compliance buys, identification of violations, correspondences, sanctions, and hearings. All of these follow-up activities are recorded in the system and associated with the triggering event. Follow-up activities in the Vendor Management system are:

- Log Application
- Compliance Buy
- Compliance Buy Returned
- Application Wizard
- Termination
- Monitoring Visit
- Letter Sent
- Violation Found
- Sanction Assessed
- Vendor Denial

- Stamp Issuance
- Signature Page Returned
- Final Disposition
- Hearing
- Appeal
- Disqualification
- Fines Collected
- First Denial Letter Returned
- Rescheduled Hearing Date
- Second Denial Letter Returned
- Annual Training Attended
- Interactive Training Attended
- New Vendor Training Scheduled
- New Vendor Training Attended
- Special Training Scheduled
- Special Training Attended
- Stamp Returned
- Probation
- Compliance Buy Checks
- Reinstate Vendor and Vendor Stamp
- Telephone Call

The Event Log tab of the Vendor folder allows the user to Add and View events and follow-up activities for a Vendor. The Events will display in chronological order. When an event has follow-up activities, the event node will be marked on the left with a “+” in the tree view.

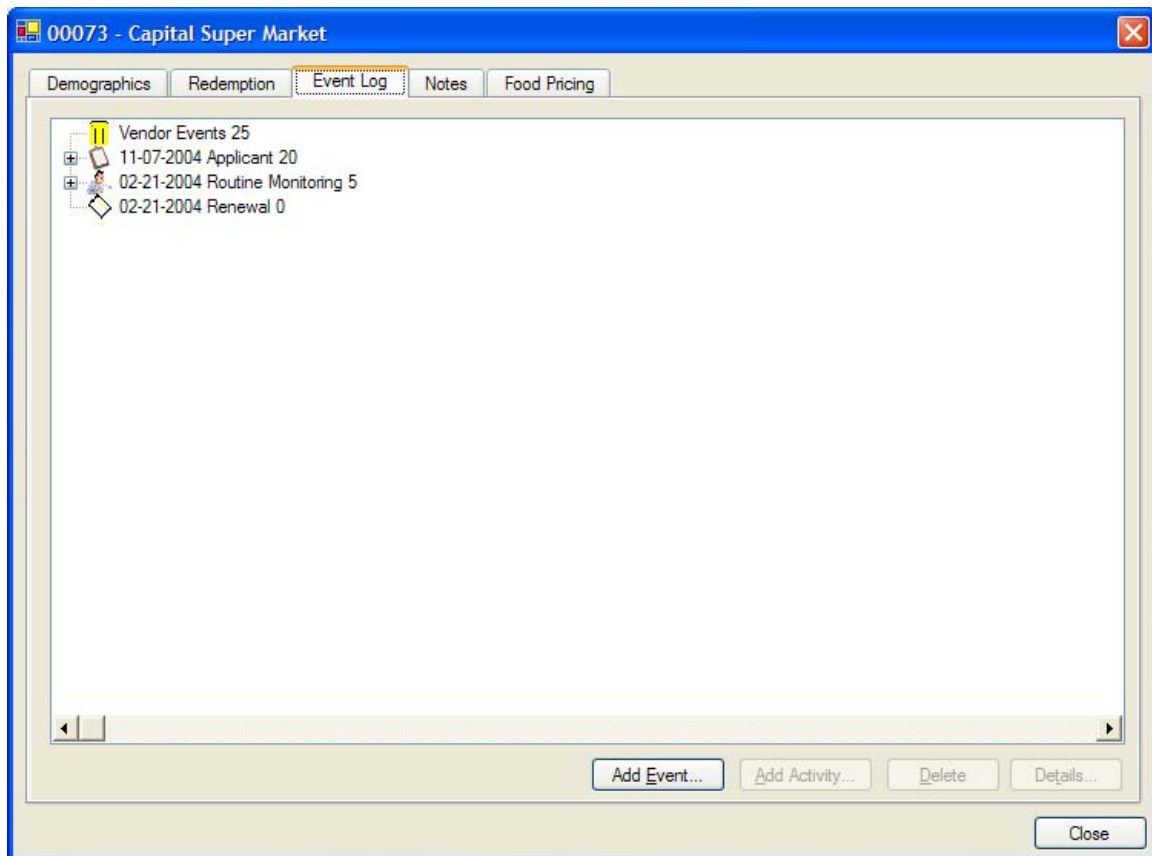


Figure 5 - Vendor Folder Dialog – Event Log Tab

#### 4.5.1 Controls

This section describes the behavior of the controls on the Events tab of the Vendor Folder.

##### 4.5.1.1 Vendor Events Display Tree View

This control allows the user to view the description of the Events and Follow-up Activities for the selected Vendor. The tree view will be enabled when the Event Log tab of the Vendor Folder is active. It will consist of the following hierarchical structure:

```
Vendor Events
|
|_Event Node
| |
| |__Follow-up Activities Node
| |__Follow-up Activities Node
|
```

## |\_\_Event Node

The tree view will be filled with all existing events and follow-up activities for the Vendor. The Events will display in chronological order. Follow-up activities will display in chronological order under the related Event. The data values on the tree view will be read-only. The system will check the permissions of the currently logged in user to determine which events and follow-up activities the user has permission to access or process.

### *4.5.1.2 Event Tree View Root - Vendor Events*

This node of the Vendor Events Display tree view allows the user to view the events for a Vendor. The node will consist of an appropriate icon, the text “Vendor Events” and the total active sanction points associated with all vendor events.

### *4.5.1.3 Event Tree View Node*

This node of the Vendor Events Display tree view allows the user to select the event for which to view Follow-up Activities. The node will consist of an appropriate icon, the date the event occurred, the event description and the total active sanction points associated with the event and all related follow-up events. The last event node in the tree will default to “expanded”. All other event nodes will be “collapsed”.

### *4.5.1.4 Follow-up Activities Tree View Node*

This node of the Vendor Events Display tree view allows the user to view the Follow-up Activities for an event. The node will consist of an appropriate icon, the date the Follow-up Activities occurred, the Follow-up Activities description and the active sanction points associated with the Follow-up Activities.

### *4.5.1.5 Add Event Button*

This control allows the user to add an event to the Vendor information. The Add Event button will be enabled when the Event Log tab of the Vendor Folder is active. It will have a mnemonic of “E”.

### *4.5.1.6 Add Activity Button*

This control allows the user to add a Follow-up Activity to an event. The Add Activity button will be enabled when an event node or a Follow-up Activity node is selected in the Vendor Events Display tree view. It will have a mnemonic of “A”.

#### ***4.5.1.7 Delete Button***

This control allows the user to delete a Follow-up Activity, or an event and all associated Follow-up Activities, from the Vendor event tree. The Delete button will be enabled when an event node or a Follow-up Activities node is selected in the Vendor Events Display tree view. It will be disabled when the event or follow-up activity in the tree is the Vendor's Initial Applicant Event or Stamp Issuance Follow-up Activity. It will have a mnemonic of "D".

#### ***4.5.1.8 Details Button***

This control allows the user to instruct the system to display the dialog associated with the selected tree view node to show more details about the item. The Details button will be enabled when the Event Log tab of the Vendor Folder is active. It will have a mnemonic of "T". This command will become disabled when a selection is made on the Stamp Issuance Follow-up Activity within the Event Log tab described in this document.

### **4.5.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Events tab of the Vendor Folder.

#### ***4.5.2.1 Initializing the Interface***

Upon selection of the Event Log tab:

- The Event Log tab will be displayed 'on-top'.
- All fields display previously saved values as defined in the Data Map for this dialog
- The Event Tree will only display all Events and Follow-up Activities as defined by the permissions set for the user.

#### ***4.5.2.2 Add Event***

Upon selection of the Add Event button, the system will invoke the Events dialog described in this document.

#### ***4.5.2.3 Add Activity***

Upon selection of the Add Activity button, the system will invoke the Follow-up Activities dialog described in this document.

#### ***4.5.2.4 Delete***

Upon selection of the Delete button:

- The system will check if the currently logged in user has the rights to delete the event or follow-up activity selected in the tree view. If the user does not have the appropriate permissions to delete the event or follow-up activity selected, the system will invoke a standard error message with the text of “You do not have the necessary permissions to delete a <function>. Please see the supervisor.”
- If the currently logged in user does have the rights to delete the event or follow-up activity selected, the system will then check if the currently logged in user is the user that added the event or follow-up activity to the Vendor Folder. If the user did not add the event then they cannot delete the event, and the system will invoke a standard error message with the text of “An event can only be deleted by the user who created the event.” If the user did not add the follow-up activity then they cannot delete the follow-up activity and the system will invoke a standard error message with the text “A follow-up can only be deleted by the user who created the follow-up activity.”
- If the selected item in the tree is an event and the currently logged in user added the event to the Vendor Folder and has the appropriate permissions to delete the event, the system will invoke a standard warning message with the text: “Are you sure you want to delete this event and its Follow-up Activities?” The message box will have Yes and No buttons. Upon selection of the Yes button, the system will delete the selected event and all associated follow-up activities from the Vendor Folder. Upon selection of the No button, the system will return the user to the Events tab of the Vendor Folder without deleting the event and its follow-up activities.
- If the selected item in the tree is a follow-up activity and the currently logged in user added the Follow-up Activity to the Vendor Folder and has the appropriate permissions to delete the Follow-up Activity, the system will invoke a standard warning message with the text: “Are you sure you want to delete this follow-up activity and its follow-up activities?” The message box will have Yes and No buttons. Upon selection of the Yes button, the system will delete the selected follow-up activities from the Vendor Folder. Upon selection of the No button, the system will return the user to the Event Log tab of the Vendor Folder without deleting the follow-up activities.
- If the user is deleting a Stamp Issuance Follow-up Activity and the stamp issuance record has already been transmitted to the bank, the system will invoke a standard error message with the text, “The Stamp Issuance information has already been transmitted. You cannot delete a Stamp Issuance Follow-up Activity that has been transmitted. You must add a Stamp Replacement event in order to change vendor stamp information.”

- The Delete button will become disabled upon selection of the following:
  - Initial Applicant Event
  - Stamp Issuance Follow-up Activity
- If the user is deleting a Stamp Replacement event and the stamp replacement record has already been transmitted to the bank, the system will invoke a standard error message with the text, “The Stamp Replacement event cannot be deleted because the record has already been transmitted. You cannot delete a Stamp Replacement event that has been transmitted. You must create a new Stamp Replacement event in order to change the Vendor Stamp Number back to its original value.”
- If the user has created multiple Stamp Replacement events for a vendor that have not yet been transmitted, the Stamp Replacement events can be deleted, but must be deleted in the reverse order in which they were created. If a non-transmitted Stamp Replacement event is selected for deletion out of proper order, the system will invoke a standard error message with the text, “The Stamp Replacement event cannot be deleted because the Stamp Number does not match the current Vendor Stamp Number. You cannot delete previous Stamp Replacement events. You must delete Stamp Replacement events in the reverse order in which they were created.”

#### 4.5.2.5 Details

Upon selection of the Details button:

- If the user does not have the appropriate permissions to view the event/follow-up activity selected, the system will invoke a standard error message with the text of “You do not have the necessary permissions to view a <function> event. Please see the supervisor.” The system will then return the user to the Event Log tab of the Vendor Folder without allowing the user to view the event details.
- If the currently logged in user does have the rights to view the selected event/follow-up activity selected in the Vendor Events Display tree view, the system will display the dialog(s) associated with the node to show more details about the item.
- The displayed dialog will be in a read only mode; the user will only be able to view the information on the dialog. When the dialog is in read only mode, a Close button will replace the Cancel button that was available on the editable version of the dialog. The Close button will dismiss the dialog and return the user to the Events tab of the Vendor Folder.

- Events and Follow-up Activities that record information and then generate a letter will have an associated dialog to show more details about the item. A Print button will be available on the associated dialog to reprint a copy of the letter that was generated when the event or follow-up activity was originally recorded in the Vendor Management system.
- Events and follow-up activities that solely generate or document a letter being sent to the Vendor do not have an associated dialog to show more details about the item. For example, the Letter Sent event generates a printed letter that is not stored in the Vendor Management system for later viewing. The Details button will be enabled for these Event and Follow-up Activities tree view nodes, but the system will not display a dialog when the button is selected.
- Events and follow-up activities that immediately create an entry in the Vendor Events Display tree view also do not have an associated dialog to show more details about the item. For example, the Annual Training Scheduled event creates an entry in the Vendor Events Display tree view without displaying a dialog. The Details button will be enabled for these Event and Follow-up Activities tree view nodes, but the system will not display a dialog when the button is selected.
- The following table describes which dialog the system displays when the Details button is selected for each event. The events that do not have an associated dialog will have "{none}" in the Dialog column of the table. A check mark appears in the Print column of the table when the Print button is available on the displayed dialog.

<b>Event</b>	<b>Dialog</b>	<b>Print</b>
Applicant	Applicant Information	√
Complaint	Complaints	
Compliance Buy	Participant Information	
Renewals	{none}	
Termination	Termination	√
Routine Monitoring Visit	Vendor Monitoring	√
Stamp Replacement	Replace Vendor Stamp Number	√

New Vendor Authorization	New Vendor Authorization	√
Letter Sent	{none}	
Sanction Assessed	Sanction	
Approved Checks	Approved Checks	√
Special Training Scheduled	Special Training	√
Approved Checks Adjusted Pay Amount	Approved Checks Adjusted Pay Amount	√
Checks Not Approved	Checks Not Approved	√
Hearing	Schedule Hearing Date	
Annual Training Scheduled	{none}	
Interactive Training Scheduled	{none}	
New Vendor Training Scheduled	New Vendor Training Scheduled	√
Annual Training Scheduled	Annual Training Scheduled	√
Interactive Training Scheduled	Interactive Training Scheduled	√
New Vendor Training Scheduled	New Vendor Training Scheduled	√
Terminate Stamp	Terminate Stamp	
Telephone Call	Telephone Call	

- The following table describes which dialog the system displays when the Details button is selected for each Follow-up Activity. The Follow-up Activities that do not have an associated dialog will have "{none}" in the Dialog column of the table. A check mark appears in the Print column of the table when the Print button is available on the displayed dialog.

Follow-up Activities	Dialog	Print
----------------------	--------	-------

Log Application	Log Application	
Compliance Buy	Participant Information	
Compliance Buy Returned	Returned Compliance Buy Checks – scheduled meeting	√
Application Wizard	Ownership Structure	√
Termination	Termination	√
Monitoring Visit	Vendor Monitoring	√
Letter Sent	{none}	
Violation Found	Violation	
Sanction Assessed	Sanction	
Vendor Denial	Deny Vendor	√
Stamp Issuance	Issue Vendor Stamp	√
Signature Page Returned	Signature Page Returned	
Final Disposition	Final Disposition	
Hearing	Schedule Hearing Date	
Appeal	Appeals	
Disqualification	Disqualification	√
Fines Collected	Fines Collected	
First Denial Letter Returned	First Denial Letter Returned	√
Rescheduled Hearing Date	Rescheduled Hearing Date	
Complaint Resolved	Complaint Resolved	

Second Denial Letter Returned	Second Denial Letter Returned	
Stamp Returned	Stamp Returned	
Probation	Probation	
Special Training Scheduled	Special Training Scheduled	√
Special Training Attended	Special Training Attended	
Annual Training Attended	Annual Training Attended	
Interactive Training Attended	Interactive Training Attended	
New Vendor Training Attended	New Vendor Training Attended	
Compliance Buy Checks	Compliance Buy Checks	
Reinstate Vendor and Vendor Stamp	Reinstate Vendor and Vendor Stamp	
Telephone Call	Telephone Call	

#### *4.5.2.6 Adding Sanction Points*

The Event Tree has the total active sanction points that are associated with all the Events and Follow-up Activities. The highest node, the root, will list the total of all the active sanction points. As you go down the Event Tree, each Event or Follow-up Activity node that has a Violation Follow-up Activity under it, will also have the total of all the active sanction points under it. The violations will have dates on which the sanction points will no longer be applied to the vendor. Once the expiration date of the violation has passed, the sanction points will no longer appear on the Event Tree or be added to the total sanction points.

## 4.6 Events

The Event dialog will allow the user to add a new event to the Vendor information. The user can select the event they want to process and enter the relevant event information. The event will be written to the Event Log for the Vendor and will be displayed on the Event Log tab of the Vendor Folder. The Event dialog is invoked when the user selects the Add Event button on the Event Log tab of the Vendor Folder as described in this document.

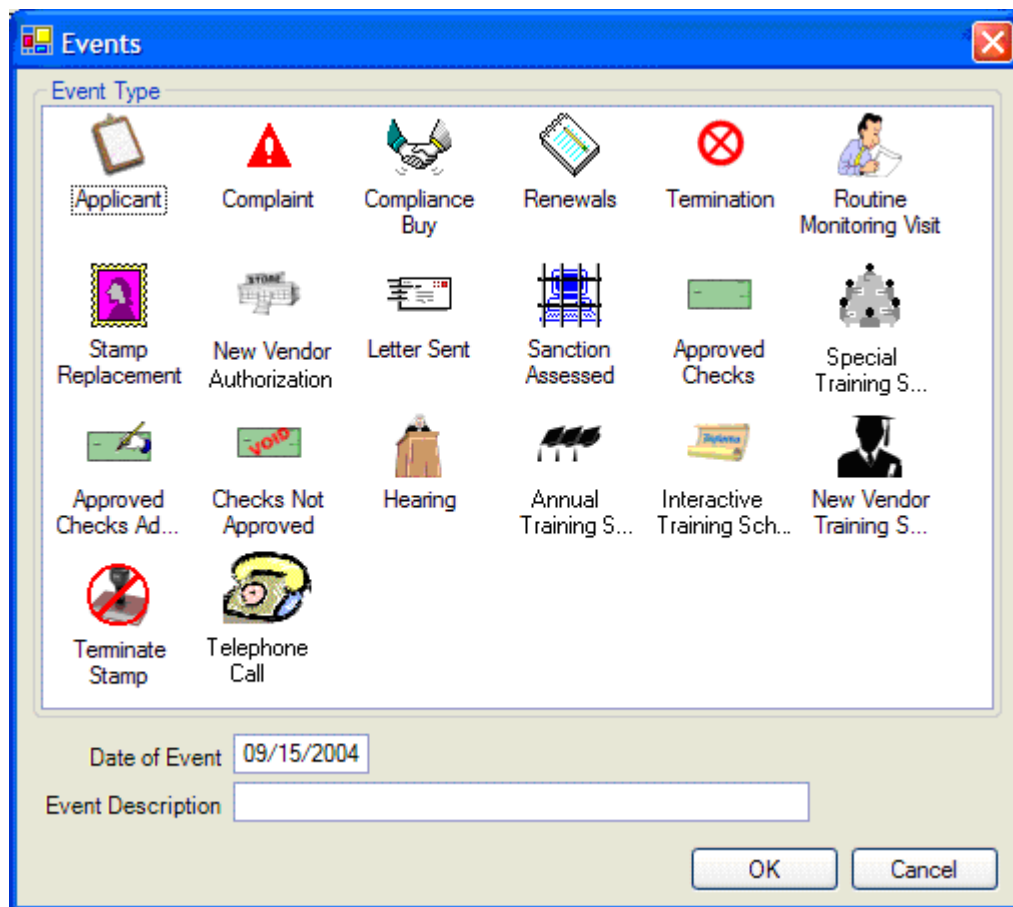


Figure 6 - Events Dialog

### 4.6.1 Controls

This section describes the behavior of the controls on the Events dialog.

#### ***4.6.1.1 Event Type Grid***

This control allows the user to select the type of event to process. The Grid will be enabled when the Events dialog is active. Each event displays as a full-sized (standard) icon with a text label. The icons cannot be rearranged within the dialog and are not in alphabetical order. The system will check the permissions of the currently logged in user to determine which events the user can view information about and which events the user can add to a Vendor. The events that the user does not have add or view permissions will not appear in the Event Type Grid.

#### ***4.6.1.2 Date of Event Masked Edit Box***

This control allows the user to enter the date the event started. The masked edit box will be enabled when the Events dialog is active. It will only allow the entry of numeric characters. The masked edit box accepts entry of numeric digits. The mask on the box will be "99/99/9999" to accept a date with a four-digit year. The string entered must be a valid date in the format of MM/DD/CCYY or MM/DD/YY. If the latter the system will automatically add the century to the year. It will initially default to the current system date. The date entered cannot be a future date.

#### ***4.6.1.3 Event Description Text Box***

This control allows the user to enter the description of the event. The text box will be enabled when the Events dialog is active. The control accepts entry of alphanumeric characters. The maximum size of the control will be fifty (50) characters. All alphabetic characters will appear in mixed case (upper and lower case) depending on how the entry was made. As text is entered in this control, the information will word wrap to accommodate multiple lines of text. Special characters are accepted in this text box with no limitations.

#### ***4.6.1.4 OK Button***

This control will allow the user to instruct the system to save the event information and proceed to the appropriate event dialog. The OK button will be enabled when the Events dialog is active. Characteristics of the OK button are defined in the *Consistencies*.

#### ***4.6.1.5 Cancel Button***

This control will allow the user to exit the Events dialog without adding a new event to the Vendor information. The Cancel button will be enabled when the Events dialog is active. Characteristics of the Cancel button are defined in the *Consistencies*.

### **4.6.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Events dialog.

#### 4.6.2.1 *Initializing the Interface*

Upon the initial display of the dialog:

- The title bar text is set to “Events”.
- The Date of Event will default to the current system date. The dialog will display all Event icons where the currently logged on user has at least VIEW permissions. If the user does not have at least VIEW permissions to an Event, the icons are hidden. The Event Description will default to blank.

#### 4.6.2.2 *Edits*

Upon selection of the OK button:

- If an entry is not made in one of the following controls
  - Date of Event Masked Edit Box
  - Event Description Text Box

the system will invoke a standard error message with the text “An entry is required for the <control label>.”

- If a selection is not made in the following control
  - Event Type Grid

the system will invoke a standard error message with the text “A selection is required in the <control label>.”

- If an event has been selected, the system will check if the currently logged in user has the appropriate permissions to add the event selected. If the user does not have the appropriate permissions to add the event, the system will invoke a standard error message with the text, "You do not have the necessary permissions to create a <function> event. Please see the supervisor."
- If an invalid value has been entered in the Date of Event field, the system will invoke a standard error message with the text “Invalid date entered.”
- If the Date of Event is not equal to or less than the current system date, the system will invoke a standard error message with the text “Date entered must be less than or equal to today’s date.”
- If the user is attempting to create a Stamp Replacement event and no Stamp Issuance Follow-up Activity exists, the system will invoke a standard error message with the text, “A Stamp Replacement event may not be added when a vendor has not been issued a vendor stamp. A vendor stamp can be assigned by creating a Stamp Issuance Follow-up Activity for the vendor.”
- If the user selects the Compliance Buy event and no print queue has been previously selected, the system will invoke a standard error message with the text, “A print queue must be defined before you can print compliance buy checks.”
- If the user does have the appropriate permissions to add the event and all of the controls have been validated, the system will invoke the Event dialog for the selected event.

- When the Applicant event is selected, the system will invoke the Applicant Information dialog as described in [Chapter 03 - Entry of New Applicants](#).
- When the Complaint event is selected, the system will invoke the Complaints dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Compliance Buy event is selected, the system will invoke the Participant Information dialog of the Compliance Buy function as described in [Chapter 16 – Compliance Buys](#).
- When the Renewals event is selected, the system will invoke the Send Vendor Application Letter dialog as described in [Chapter 03 - Entry of New Applicants](#).
- When the Termination event is selected, the system will invoke the Termination dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Routine Monitoring Visit event is selected, the system will invoke the Vendor Monitoring dialog as described in [Chapter 14 - Vendor Monitoring](#).
- When the Stamp Replacement event is selected, the system will invoke the Replace Vendor Stamp Number dialog as described in [Chapter 12 - Vendor Stamp](#).
- When the New Vendor Authorization event is selected, the system will invoke the New Vendor Authorization dialog as described in [Chapter 14 - Vendor Monitoring](#).
- When the Letter Sent event is selected, the system will invoke the Sending Letter dialog as described in [Chapter 20 – Vendor Form Letters](#).
- When the Sanction Assessed event is selected, the system will invoke the Sanction dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Approved Checks event is selected, the system will invoke the Approved Checks dialog as described in [Chapter 17 - Approving and Denying Checks](#).
- When the Special Training event is selected, the system will invoke the Special Training dialog as described in [Chapter 18 - Vendor Training](#).
- When the Approved Checks Adjusted Pay Amount event is selected, the system will invoke the Approved Checks Adjusted Pay Amount dialog as described in [Chapter 17 - Approving and Denying Checks](#).
- When the Checks Not Approved event is selected, the system will invoke the Checks Not Approved dialog as described in [Chapter 17 - Approving and Denying Checks](#).
- When the Hearing event is selected, the system will invoke the Schedule Hearing Date dialog as described in [Chapter 15 - Hearings and Appeals](#).

- When the Annual Training Scheduled event is selected, the system will invoke the Annual Training Scheduled dialog as defined in [Chapter 18 - Vendor Training](#).
- When the Interactive Training Scheduled event is selected, the system will invoke the Interactive Training Scheduled dialog as defined in [Chapter 18 - Vendor Training](#).
- When the New Vendor Training Scheduled event is selected, the system will invoke the New Vendor Training Scheduled dialog as defined in [Chapter 18 - Vendor Training](#).
- When the Terminate Stamp event is selected, the system will invoke the Terminate Stamp dialog as described in [Chapter 12 - Vendor Stamp](#).
- When the Telephone Call event is selected, the system will invoke the Telephone Call dialog as described in [Chapter 23 – Telephone Call](#)
- If a Vendor is Disqualified or Terminated and the Events dialog is enabled, the only Event available is the Applicant Event. If the user selects any other Event, a message will be displayed, “Vendor is {status of vendor}. Applicant Event must be selected.”

#### 4.6.2.3 Cancel

Upon selection of the Cancel button:

- The Events dialog will be dismissed without saving any of the entered information. The system will return the user to the Event Log tab of the Vendor Folder.

## 4.7 Follow-up Activities

The Follow-up Activities dialog allows the user to add a follow-up activity to an existing event on the Vendor Folder. The user can select the follow-up activities they want to process and enter the relevant follow-up activity information. The follow-up activities will be written to the Event Log for the Vendor and will be displayed on the Event Log tab of the Vendor Folder. This dialog is invoked when the user selects the Add Activity button on the Event Log tab of the Vendor Folder described in this document.

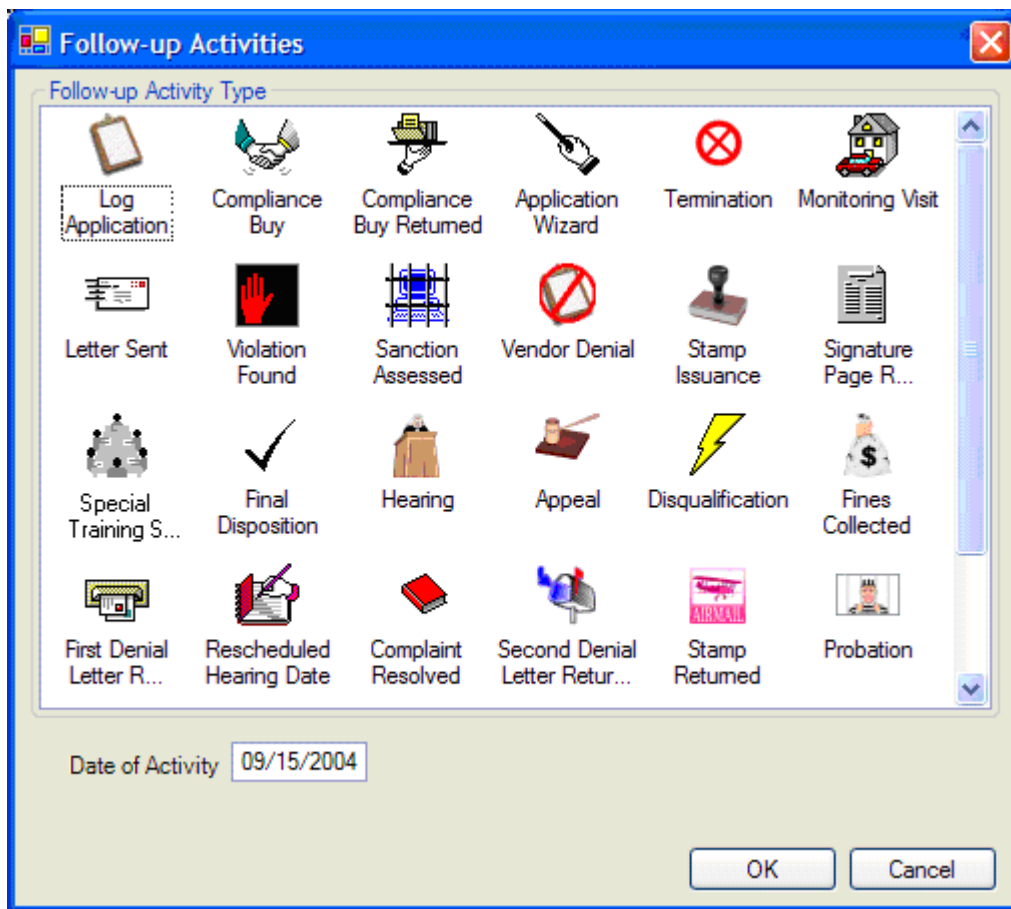


Figure 7- Follow-up Activities Dialog

### 4.7.1 Controls

This section describes the behavior of the controls on the Follow-up Activities dialog.

#### ***4.7.1.1 Follow-up Activities Type Grid***

This control allows the user to select the type of follow-up activity to process. The Grid will be enabled when the Follow-up Activities dialog is active. Each follow-up activity displays as a full-sized (standard) icon with a text label. The icons cannot be rearranged within the dialog and are not in alphabetical order. The system will check the permissions of the currently logged in user to determine which follow-up activities the user can add to a Vendor. The follow-up activities that the user does not have add or view permissions will not appear in the Follow-up Activity Grid.

#### ***4.7.1.2 Date of Activity Masked Edit Box***

This control allows the user to enter the date the follow-up activity started. The masked edit box will be enabled when the Follow-up Activities dialog is active. The masked edit box accepts entry of numeric digits. The mask on the box will be “99/99/9999” to accept a date with a four-digit year. The string entered must be a valid date in the format of MM/DD/CCYY or MM/DD/YY. If the latter the system will automatically add the century to the year. It will initially default to the current system date. The date entered cannot be a future date.

#### ***4.7.1.3 OK Button***

This control will allow the user to instruct the system to save the follow-up activities information and proceed to the appropriate Follow-up Activities dialog. The OK button will be enabled when the Follow-up Activities dialog is active. Characteristics of the OK button are defined in the *Consistencies*.

#### ***4.7.1.4 Cancel Button***

This control will allow the user to exit the Follow-up Activities dialog without adding a new follow-up activity to the Vendor information. The Cancel button will be enabled when the Follow-up Activities dialog is active. Characteristics of the Cancel button are defined in the *Consistencies*.

### **4.7.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Follow-up Activities dialog.

#### ***4.7.2.1 Initializing the Interface***

Upon the initial display of the dialog:

- The title bar text is set to “Follow-up Activities”.

- The Date of Activity will default to the current system date. The dialog will display all Follow-up icons where the currently logged on user has at least VIEW permissions. If the user does not have at least VIEW permissions to a Follow-up Activity, the icons are hidden..

#### 4.7.2.2 Edits

Upon selection of the OK button:

- If an entry is not made in the following control
  - Date of Activity Masked Edit Boxthe system will invoke a standard error message with the text “An entry is required for the <control label>.”
- If a selection is not made in the following control
  - Follow-up Activities Type Gridthe system will invoke a standard error message with the text “A selection is required in the <control label>.”
- If the user does not have the appropriate permissions to add the activity, the system will invoke a standard error message with the text, "You do not have the necessary permissions to create a <function> Follow-up Activity. Please see the supervisor."
- If an invalid value has been entered in the Date of Activity field, the system will invoke a standard error message with the text “Invalid date entered.”
- If the Date of Activity is not equal to or less than the current system date, the system will invoke a standard error message with the text “Date entered must be less than or equal to today’s date.”
- If the user has selected the Stamp Issuance Follow-up Activity and the vendor has already been issued a stamp, the system will invoke a standard error message with the text, “A Vendor Stamp has previously been issued for this vendor, and only one Stamp Issuance follow-up activity is allowed for a vendor. In order to change the current vendor stamp number, you must create a Stamp Replacement event.”
- If the user selects the Compliance Buy follow-up activity and no print queue has been previously selected, the system will invoke a standard error message with the text, “A print queue must be defined before you can print compliance buy checks.”

If the user does have the appropriate permissions to add the follow-up activity and all of the controls have been validated, the system will invoke the Follow-up Activity dialog for the selected follow-up activity.

- When the Log Application follow-up Activity is selected, the system will invoke the Log Application dialog as described in [Chapter 03 - Entry of New Applicants](#).

- When the Compliance Buy follow-up activity is selected, the system will invoke the Participant Information dialog of the Compliance Buy function as described in [Chapter 16 – Compliance Buys](#).
- When the Compliance Buy Returned follow-up activity is selected, the system will invoke the Returned Compliance Buy Checks dialog as described in [Chapter 16 – Compliance Buys](#).
- When the Application Wizard follow-up activity is selected, the system will invoke the Ownership Structure dialog of the Application Wizard as described in [Chapter 09 – Application Wizard](#).
- When the Termination follow-up activity is selected, the system will invoke the Termination dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Monitoring Visit follow-up activity is selected, the system will invoke the Vendor Monitoring dialog as described in [Chapter 14 - Vendor Monitoring](#).
- When the Letter Sent follow-up activity is selected, the system will invoke the Sending Letter dialog as described in [Chapter 20 – Vendor Form Letters](#).
- When the Violation follow-up activity is selected, the system will invoke the Violation dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Sanction Assessed follow-up activity is selected, the system will invoke the Sanction dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Vendor Denial follow-up activity is selected, the system will invoke the Deny Vendor dialog as described in [Chapter 13 - Vendor Denial](#).
- When the Stamp Issuance follow-up activity is selected, the system will invoke the Issue Vendor Stamp dialog as described in [Chapter 12 - Vendor Stamp](#).
- When the Signature Page Returned follow-up activity is selected:
  - If an Application Wizard follow-up activity does not exist for the vendor, the system will invoke a standard error message with the message text, "You must first complete the Application Wizard."
  - If an Application Wizard follow-up activity has been added for the vendor, the system will invoke the Signature Page Returned dialog as described in [Chapter 09 – Application Wizard](#).
- When the Special Training follow-up activity is selected, the system will invoke the Special Training dialog as described in [Chapter 18 - Vendor Training](#).
- When the Final Disposition follow-up activity is selected, the system will invoke the Final Disposition dialog as described in [Chapter 15 - Hearings and Appeals](#).

- When the Hearing follow-up activity is selected, the system will invoke the Schedule Hearing Date dialog as described in [Chapter 15 - Hearings and Appeals](#).
- When the Appeal follow-up activity is selected, the system will invoke the Appeals dialog as described in [Chapter 15 - Hearings and Appeals](#).
- When the Disqualification follow-up activity is selected, the system will invoke the Disqualification dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Fines Collected follow-up activity is selected, the system will invoke the Fines Collected dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the First Denial Letter Returned follow-up activity is selected, the system will invoke the First Denial Letter Returned dialog as described in [Chapter 13 - Vendor Denial](#).
- When the Rescheduled Hearing Date follow-up activity is selected, the system will invoke the Rescheduled Hearing Date dialog as described in [Chapter 15 - Hearings and Appeals](#).
- When the Complaint Resolved follow-up activity is selected, the system will invoke the Complaint Resolved dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Second Denial Letter Returned follow-up activity is selected, the system will invoke the Second Denial Letter Returned dialog as described in [Chapter 13 - Vendor Denial](#).
- When the Stamp Returned follow-up activity is selected, the system will invoke the Stamp Returned dialog as described in [Chapter 11 – Penalties Assessed](#).
- When the Probation follow-up activity is selected, the system will invoke the Probation dialog as described in [Chapter 05 - Probation](#).
- When the Special Training Attended follow-up activity is selected, the system will invoke the Special Training dialog as described in [Chapter 18 - Vendor Training](#).
- When the Annual Training Attended follow-up activity is selected, the system will invoke the Annual Training Attended dialog as described in [Chapter 18 - Vendor Training](#).
- When the Interactive Training Attended follow-up activity is selected, the system will invoke the Interactive Training Attended dialog as described in [Chapter 18 - Vendor Training](#).
- When the New Vendor Training Attended follow-up activity is selected, the system will invoke the New Vendor Training Attended dialog as described in [Chapter 18 - Vendor Training](#).
- When the Reinstate Vendor and Vendor Stamp follow-up activity is selected, the system will invoke the Reinstate Vendor and Vendor Stamp dialog as described in [Chapter 6 – Reinstate](#).
- When the Telephone Call follow-up activity is selected, the system will invoke the Telephone Call dialog as described in [Chapter 23 – Telephone Call](#).

#### ***4.7.2.3 Cancel***

Upon selection of the Cancel button:

- The Follow-up Activities dialog will be dismissed.
- The system will return the user to the Event Log tab of the Vendor Folder.

## 4.8 Redemption Tab

The Redemption tab of the Vendor Folder allows the user to view WIC check redemption history information for the current federal fiscal year for the selected Vendor. The months will be displayed in order starting with October. There will be a row for each month even if there were no redemptions for that vendor in that time period.

Redemption History for the Current Fiscal Year					
	Year	Number of Checks	Redemption Amount	Number of Checks Fiscal Year	Redemption Amount Fiscal Year
October	2004	20	\$425.00	20	\$425.00
November	2004	70	\$1250.00	90	\$1675.00
December	2004	100	\$1500.00	190	\$3125.00
January	2005				
February	2005				
March	2005				
April	2005				
May	2005				
June	2005				
July	2005				
August	2005				
September	2005				

Total Redemption Amount \$ 3,175.00

Figure 8 - Vendor Folder Dialog - Redemption Tab

### 4.8.1 Controls

This section describes the behavior of the controls on the Redemption tab of the Vendor Folder.

#### 4.8.1.1 Redemption History Display Grid

This control allows the user to view the WIC check redemption history for the Vendor. The display grid will be enabled when the Redemption tab of the Vendor Folder is active. It will have five columns:

- Year
- # of Checks
- Redemption Amount
- # of Checks Fiscal Year

- Redemption Amount Fiscal Year

The values in the control will be read only. The grid will contain a row for each month in the past that the vendor has redeemed WIC checks. The system will reflect an empty row for the month if the vendor had no redemptions in the period. This is part of the End of Day process (EOD).

#### ***4.8.1.2 Total Redemption Amount Label***

This control will display the total dollar amount of all the redemptions that are on the system. The control displays in the inverse color of the form. It will have a format of \$####,###,###.##.

### **4.8.2 Processing**

There are no updateable controls on this tab. Therefore there are no processes (navigation) that take place on the Redemption tab of the Vendor Folder. There are four reports in relation to the Redemption table; Corporate Store Listing, Ranking of Vendors by Number of Checks Redeemed, Ranking of Vendors by Value of Checks Redeemed and Vendor Profile and are described further in [Chapter 19 - Vendor Reports](#).

#### ***4.8.2.1 Initializing the Interface***

Upon selection of the Redemption tab:

- The Redemption tab will be displayed 'on-top'.
- The form will be loaded with the redemption history for the selected vendor.
- The Redemption History will be listed in descending order by Fiscal Year and Month.
- All controls on this dialog will be read only.

#### ***4.8.2.2 Edits***

There are no updateable controls on this tab.

## 4.9 Notes Tab

The Notes tab of the Vendor Folder allows the user to view, add, and edit notes regarding this Vendor. These are free form notes that do not fit under a particular event or Follow-up Activity. For example, if the Vendor always shows up as a high risk vendor (because of the location or the amount of stock it has) but is not considered a high risk, a note can be added to the Vendor Folder to inform other staff members of the issue.

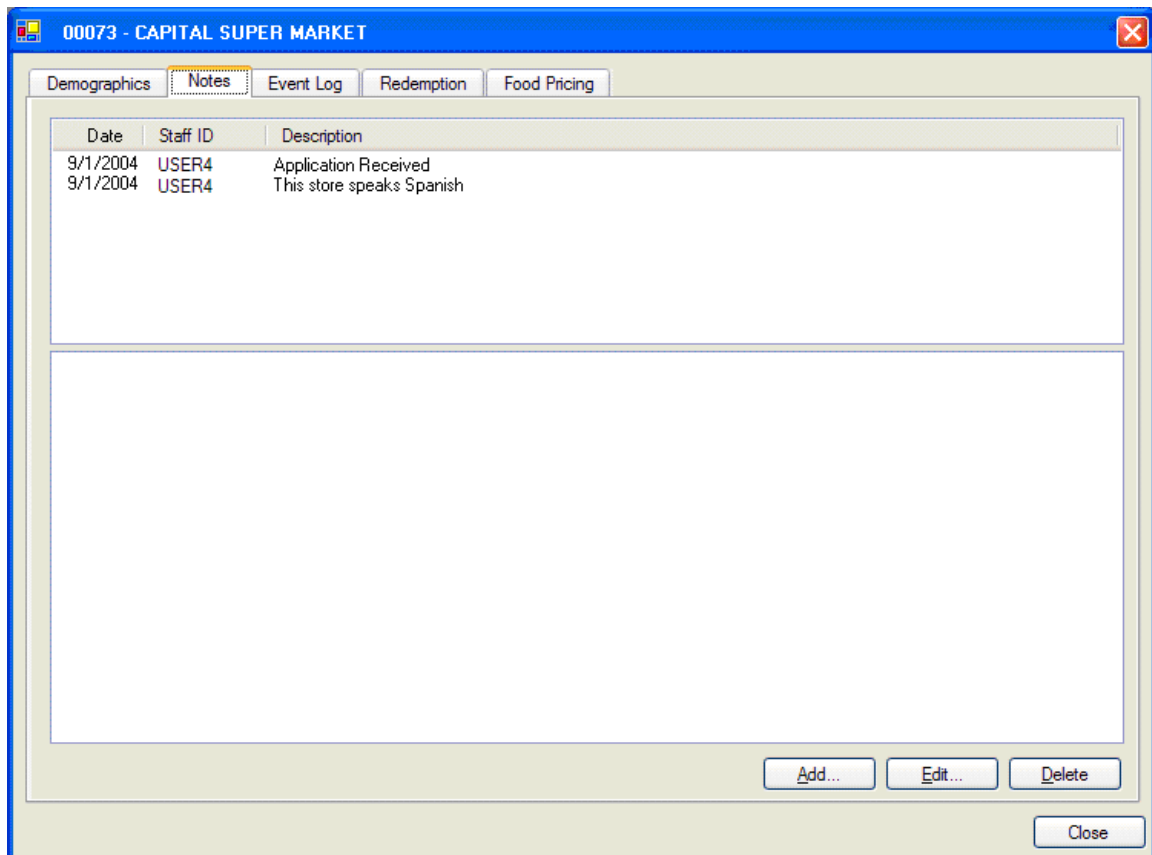


Figure 9 - Vendor Folder Dialog - Notes Tab

### 4.9.1 Controls

This section describes the behavior of the controls on the Notes tab of the Vendor Folder.

#### 4.9.1.1 Notes Grid

This control allows the user to view the notes entered about this Vendor. The Grid will be enabled when the Notes tab of the Vendor Folder is active. It will consist of the following columns:

- Date
- Staff ID (the last user to modify the note)
- Description (the first 50 characters of the note)

The values in the control will be read only. The grid will be sorted in reverse chronological order by Date.

#### ***4.9.1.2 Full Note Text Box***

This control allows the user to view the complete contents of a note. The text box will be enabled when the Notes tab of the Vendor Folder is active and a note is selected in the Notes Grid. The value in the control will be read only.

#### ***4.9.1.3 Add Button***

This control allows the user to add a note to the Vendor Folder. The Add button will be enabled when the Notes tab of the Vendor Folder is active. It will have a mnemonic of "A".

#### ***4.9.1.4 Edit Button***

This control allows the user to edit a selected note. The Edit button will be enabled when the Notes tab of the Vendor Folder is active and a note is selected in the Notes Grid. It will have a mnemonic of "E".

#### ***4.9.1.5 Delete Button***

This control allows the user to delete a selected note from the Vendor folder. This button will be enabled when the Notes tab of the Vendor Folder is active and a note is selected in the Notes Grid. It will have a mnemonic of "D".

### **4.9.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Notes tab of the Vendor Folder.

#### ***4.9.2.1 Initializing the Interface***

Upon selection of the Notes tab:

- The Notes tab will be displayed 'on-top'.
- All notes for the vendor will be displayed in descending order by date.

#### ***4.9.2.2 Edits***

There are no updateable controls on this tab.

#### ***4.9.2.3 Add***

Upon selection of the Add button, the system will invoke the Add Note dialog as described in this document.

#### ***4.9.2.4 Edit***

Upon selection of the Edit button,

- If the user did not add the vendor note then they cannot edit the note, and the system will invoke a standard error message with the text of “A vendor note can only be edited by the user who created the note.” The system will then return the user to the Notes tab of the Vendor Folder without modifying the note.
- If the user added the note to the Vendor Folder, the system will invoke the Edit Note dialog as described in this document.

#### **4.9.2.5 Delete**

Upon selection of the Delete button:

- If the user did not add the vendor note then they cannot delete the note, and the system will invoke a standard error message with the text of “A vendor note can only be deleted by the user who created the note.” The system will then return the user to the Notes tab of the Vendor Folder without deleting the note.
- If the user added the note to the Vendor Folder, the system will invoke a standard error message with the text “Are you sure you want to delete this vendor note?” The message box will have Yes and No buttons. Upon selection of the Yes button, the system will delete the selected note from the Vendor Folder. Upon selection of the No button, the system will return the user to the Notes tab of the Vendor Folder without deleting the note.

#### 4.10 Update Notes

The Update Notes dialog allows the user to add and edit notes regarding this Vendor. These are free form notes that do not fit under a particular event or follow-up activity. For example, if the Vendor always shows up as a high risk vendor (because of the location or the amount of stock it has) but is not considered a high risk, a note can be added to the Vendor Folder to inform other staff members of the issue. The Update Notes dialog is invoked in response to the following user actions:

- Selection of the Add button or Alt+A, on the Notes tab of the Vendor Folder described in this document.
- Selection of the Edit button or Alt+E, on the Notes tab of the Vendor Folder described in this document.

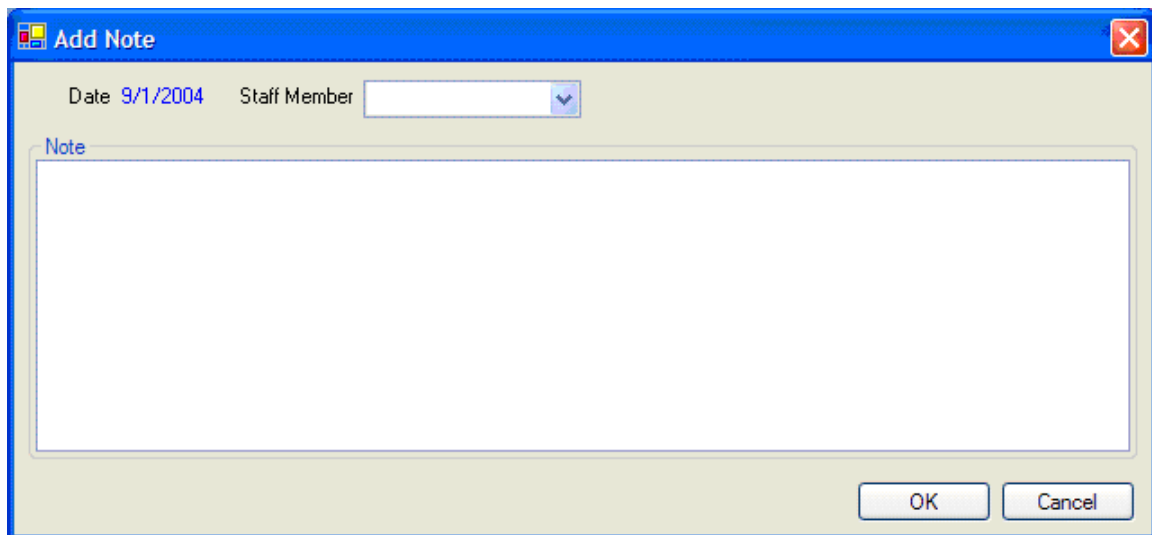


Figure 10 – Add Note Dialog

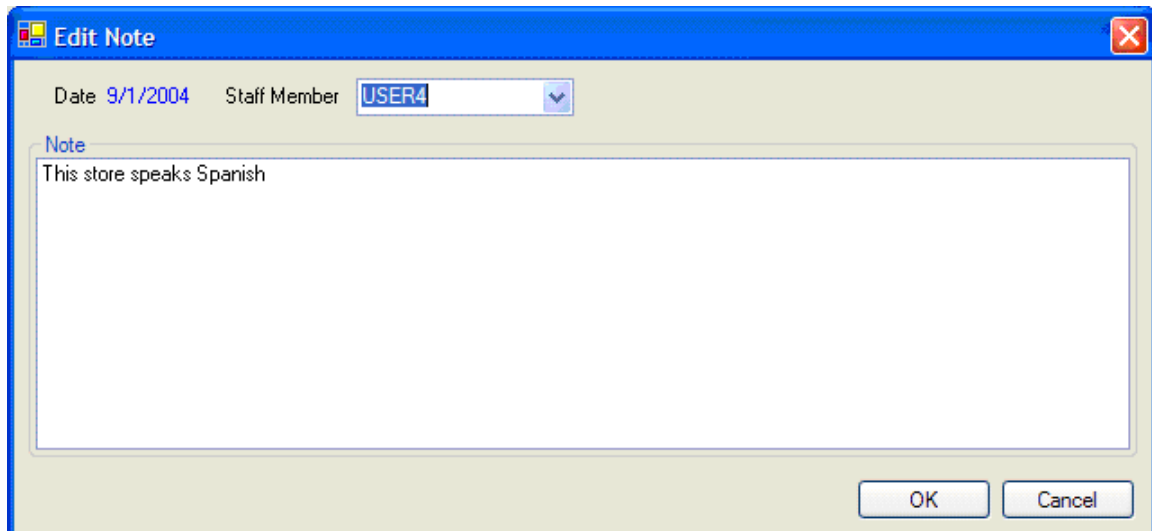


Figure 11 – Edit Note Dialog

### 4.10.1 Controls

This section describes the behavior of the controls on the Add / Edit Note dialog.

#### 4.10.1.1 Date Label and Text Value

This control allows the user to view the date of the note. The Date label and text value will be enabled with the dialog is active. In add mode the value will default to the current system date. In edit mode the control will display the previously saved value. It is a read only control and is displayed in the inverse color of the form.

#### 4.10.1.2 Staff Member Dropdown

This control allows the user to select which staff member entered the note. The dropdown will be enabled when the Notes dialog is active. It will be a read only drop down list. It is filled with a list of staff members from the STAFF-MEMBER entity and will be displayed in alphabetical order. When working in “add” mode, the control will initially be blank. When working in “edit” mode, the control will be populated with the value of the Staff ID column of the note that was selected in the Notes Grid on the Notes tab of the Vendor Folder.

#### 4.10.1.3 Note Text Box

This control allows the user to enter the text of the note. The text box will be enabled when the Update Notes dialog is active. The maximum size of the control will be four thousand (4,000) characters. As text is entered in this control, the information will word wrap to accommodate multiple lines of text. A vertical scroll bar is visible and enabled when the text reaches the bottom or last visible line of this control. Alphabetic characters may be entered in mixed case (upper and lower case). Special characters are permitted in the text box. When working in “add” mode, the fields will initially be blank. When working in “edit” mode, the control is populated with the previously saved entry.

#### 4.10.1.4 OK Button

This control allows the user to instruct the system to save the note and close the Update Notes dialog. The OK button will be enabled when the Update Notes dialog is active. Characteristics of the OK button are defined in the *Consistencies*.

#### 4.10.1.5 Cancel Button

This control allows the user to exit the Notes dialog without saving the note. The Cancel button will be enabled when the Update Notes dialog is active. Characteristics of the Cancel button are defined in the *Consistencies*.

## 4.10.2 Processing

This section describes the processes (navigation) that take place as a result of the actions taken on the Update Notes dialog.

### 4.10.2.1 Initializing the Interface

Upon the initial display of the dialog:

- In add mode the title bar will be set to “Add Note”.
- In edit mode the title bar will be set to “Edit Note”.
- In add mode the date value will be set to the current system date.
- In add mode the Staff Member and Note text box will default to blank.
- In edit mode the controls will default to the previously saved values as defined in the Data Map for this dialog.

### 4.10.2.2 Edits

Upon selection of the OK button:

- If an entry has not been made in the following control
  - Notes Text Boxthe system will invoke a standard error message with the text “An entry is required in the <control label>.”
- If a selection has not been made in the following control
  - Staff Member Dropdownthe system will invoke a standard error message with the text “A selection is required in the <control label>.”

### 4.10.2.3 Edits

Upon successful completion of the above listed edits:

- The system will save the note as defined in the data map below
- The system will return to the Notes tab of the Vendor Folder.

### 4.10.2.4 Cancel

Upon selection of the Cancel button:

- The system will dismiss the Update Notes dialog without saving the note.
- The system will return the user to the Notes tab of the Vendor Folder.

### 4.10.2.5 Data Map

Control Label	Entity	Attribute
---------------	--------	-----------

Date	VENDORNOTES	CreateDate
Staff Member	VENDORNOTES	UserID
Description	VENDORNOTES	Description



#### *4.11.1.1 Last Updated Date Text Label and Value (Date)*

This text label and value allows the user to view the date the Price Survey for the vendor was last updated. The value label will be set to the value of the date the selected vendor's price survey was updated. The date will display in the inverse color of the form. This control is read only. Value default is initially blank. Once entry is made, the value will default to the previously saved date.

#### *4.11.1.2 Price List Date Text Label and Value (Date)*

This text label and value allows the user to view the date the Price Survey was initiated by the vendor. The label will be visible and enabled when the Price Survey sub-tab is active. The date will display in the inverse color of the form. This control is read only and will display in the format of MM/DD/CCYY. Value default is initially blank. Once entry is made, the value will default to the previously saved date.

#### *4.11.1.3 Staff Member Label Text Label and Value (Text)*

This text label and value allows the user to view the staff member's name that entered the prices for the vendor. The text label will be visible and enabled when the Price Survey sub-tab is active. The staff member's name will display in the inverse color of the form and in upper case. Value default is initially blank. Once entry is made, the value will default to the previously saved staff member.

#### *4.11.1.4 New Price List Button*

This control allows the user to instruct the system to activate a New Price List for the vendor. Selection of this button will invoke the New Price List dialog, as described in this chapter, and provides the user the ability to generate a new price survey. The New Price List button will be visible and enabled when the Price Survey sub-tab is active on the Food Pricing Tab. It has a mnemonic of "N". The user can use the mouse or press alt+N to instruct the button to invoke the New Price List dialog.

### **4.11.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Price Survey sub-tab.

#### *4.11.2.1 Initializing the Interface*

Upon selection of the Food Pricing tab:

- The Food Pricing tab will be initially displayed 'on-top'.
- The controls will default to the previously saved values as defined in the Data Map for this dialog.

#### *4.11.2.2 Edits*

There are no updateable controls on this tab.

#### ***4.11.2.3 New Price List***

Upon selection of the New Price List button:

- The system will invoke a standard message with the text “Are you sure you want to replace the current price list?” The options of “Yes” and “No” will be available. If the user selects “Yes”, the New Price List dialog is displayed. If the user selects “No”, the system will return to the Price Survey grid of the Food Pricing tab without any changes to the price list.



#### ***4.12.1.1 Price List Date Masked Edit Box***

This control allows the user to enter the date of the New Price List being entered in the system and activated for the vendor. The masked edit box will be enabled when the New Price List is active. The mask on the box will be “99/99/9999” to accept a date with a four-digit year. A valid date must be entered in the format of MM/DD/CCYY or MM/DD/YY. If the latter, the system will automatically add the century to the year. Entering the letter “T” will cause the system to insert the current system date into the field. If a date already exists in the field, entering the letter “F” will cause the system to insert the first day of that month into the field. Entering the letter “M” will cause the system to insert the fifteenth day of that month into the field. Entering the letter “L” will cause the system to insert the last day of that month into the field. It will default to the present system date.

#### ***4.12.1.2 Staff Member Dropdown***

This control allows the user to enter the staff member who entered the prices. The dropdown will be enabled when the New Price List dialog is active. It will be a read only drop down list. It is filled with a list of staff members from the STAFF-MEMBER entity, which are displayed in alphabetical order within the list. To make a selection in this field, the user may use the mouse, arrow keys or the first character of the item within the list. If there is more than one item within the list with the same first character, the user may select that character to move through the list of items beginning with that character and pressing enter when making a selection. A character that is selected and is not found in the list, no change is made.

#### ***4.12.1.3 Use Previous Prices Check Box***

This control allows the user to indicate that the prices from the previous price list should be automatically copied to the new price list. The check box will be enabled when the New Price List dialog is active. It will initially be unchecked.

#### ***4.12.1.4 OK Button***

This control allows the user to instruct the system to start a New Price List for the Vendor. The OK button will be enabled when the New Price List dialog is active. Characteristics of the OK button are defined in the *Consistencies*.

#### ***4.12.1.5 Cancel Button***

This control allows the user to exit the New Price List dialog without starting a new price list. The Cancel button will be enabled when the New Price List dialog is active. Characteristics of the Cancel button are defined in the *Consistencies*.

### 4.12.2 Processing

This section describes the processes (navigation) that take place as a result of the actions taken on the New Price List dialog.

#### 4.12.2.1 *Initializing the Interface*

Upon the initial display of the dialog:

- The title bar will be set to “New Price List”.
- The Price List Date will default to the current system date. All other controls will default to blank.

#### 4.12.2.2 *Edits*

Upon selection of the OK button:

- If an entry has not been made in the following control
  - Price List Date masked edit boxthe system will invoke a standard error message with the text “An entry is required for the <control label>.”
- If a selection is not made in the following control
  - Staff Member dropdownthe system will invoke a standard error message with the text “A selection is required in the <control label>.”
- If an invalid date has been entered in the Price List Date field the system will invoke a standard error message with the text “The date of the price list must be equal to or less than today's date”.
- If the Use Previous Prices check box is unmarked then the system will reset all prices for the vendor to zero (0) or blank.
- If the Use Previous Prices check box is marked then the system will create new prices for the vendor using the information from the previous price list.
- The system will return the user to the Price Survey sub-tab on the Food Pricing tab of the Vendor Folder.

#### 4.12.2.3 *Cancel*

Upon selection of the Cancel button

- The system will dismiss the New Price List dialog without saving any information entered and will return the user to the Price Survey sub-tab on the Food Pricing tab of the Vendor Folder.

#### 4.12.2.4 *Data Map*

Control Label	Entity	Attribute
---------------	--------	-----------

New Price List	VendorPriceList	PriceListDate
----------------	-----------------	---------------

### 4.13 Price Survey Sub-tab

Once a vendor is accepted in the WIC program there are times throughout the contract when food item pricing is done. This pricing will be used to create a peer group price for that food item. The bank will use the price to determine whether or not the food instrument is accepted or rejected. This sub-tab is updateable through the edit function. In order to view the Price Survey grid it is the default sub-tab for the Food Pricing tab within the Vendor Folder. When the Food Pricing tab is invoked, the Price Survey sub-tab will display on top.

ID	Description	Vendor Price	Average Price	Percent (+/-)	Max Price	Percent (+/-)
520	(16 OZ) BOX POWERED MILK	.00	7.50			
201	1 (16 OZ) OR LESS PKG WIC CHEESE	3.49	3.44	1%	4.13	-15%
501	1 GAL MILK	1.19	2.69	-56%	3.23	-63%

Figure 14 – Price Survey Sub-tab

#### 4.13.1 Controls

This section describes the behavior of the controls on the Price Survey sub-tab within the Food Pricing tab of the Vendor Folder.

##### 4.13.1.1 Price Survey Grid

This control allows the user to view the price survey information previously entered into the system for the vendor. The Price Survey Grid will be enabled when the Price Survey sub-tab is active. The grid consists of seven (7) columns:

- ID
- Description

- Vendor Price
- Peer Group Average Price
- Percent (+/-)
- Over Max Price
- Percent (+/-)

The entries in the grid will be sorted by the ID column in ascending order. This grid will not have any other sorting abilities and has no selection other than highlighting a row. There will be horizontal/vertical scroll bars that will be displayed when the Grid reaches the end to allow for additional lines now within the view area. The values within the grid are read-only and can be updated by selection of the edit command. This command only allows modification to the Price and the Include in Average check box.

#### 4.13.1.1.1 ID Column

The column will be enabled when the Price Survey grid is active. It will be read only and the IDs will be displayed right aligned.

#### 4.13.1.1.2 Description Column

The column will be enabled when the Price Survey grid is active. It will be read only and the Description will be displayed left aligned.

#### 4.13.1.1.3 Vendor Price Column

The column will be enabled when the Price Survey grid is active. It will be read only and the Vendor Price will be displayed right aligned.

#### 4.13.1.1.4 Peer Group Average Price Column

The column will be enabled when the Price Survey grid is active. It will be read only and the Peer Group Average Price will be displayed right aligned.

#### 4.13.1.1.5 Percent (+/-) Column

The column will be enabled when the Price Survey grid is active. It will be read only and the Percentage will be displayed left aligned.

#### 4.13.1.1.6 Over Max Price Column

The column will be enabled when the Price Survey grid is active. It will be read only and the Over Max Price will be displayed right aligned.

#### 4.13.1.1.7 Percent (+/-) Column

The column will be enabled when the Price Survey grid is active. It will be read only and the Percentage will be displayed left aligned.

#### **4.13.1.2 Edit Button**

This control allows the user to bring up the Edit Vendor Price dialog to enter the prices from the Vendor Price Survey. The Edit button will be enabled when the Price Survey sub-tab is active. It has a mnemonic of “E”.

### **4.13.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Price Survey sub-tab.

#### **4.13.2.1 Initializing the Interface**

Upon selection of the Price Survey sub-tab:

- The Price Survey sub-tab will be initially displayed ‘on-top’.
- The controls will default to the previously saved values as defined in the Data Map for this dialog.

#### **4.13.2.2 Edits**

There are no updateable controls on this tab.

#### **4.13.2.3 Edit**

Upon selection of the Edit button:

- The system will invoke the Edit Vendor Price dialog described in this document.

#### **4.13.2.4 Data Map**

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>
Last Updated	VENDORPRICES	ModifyDate
Price List Date	VENDORPRICES	PriceListDate
Item ID	VENDORPRICES/ FOODDISTRIBUTIONITEM	DistributionItemID/ DistributionItemID
Description	FOODDISTRIBUTIONITEM	Description
Price	VENDORPRICES	VendorPrice
Average Price	PEERGROUPOODITEM	AveragePrice

Percent	Calculated value	
Max Price	PEERGROUPOODITEM	MaxPrice
Percent	Calculated value	

#### 4.14 Edit Vendor Price

When the Vendor returns the price survey, the prices will be entered into the system. These prices are then listed in the Price Survey grid on the Price Survey sub-tab. The figures listed in the grid are then used for calculating the Vendor Average Price for each item within the price survey. The Price can be modified if necessary by editing the item within the Price Survey grid. In order to enter a new price list, the New Price List dialog is invoked in response to the following user actions:

- Selection of the Edit button from the Price Survey sub-tab on the Food Pricing tab in Vendor Folder.
- Selection of the Alt+E keys from the Price Survey sub-tab on the Food Pricing tab in the Vendor Folder.

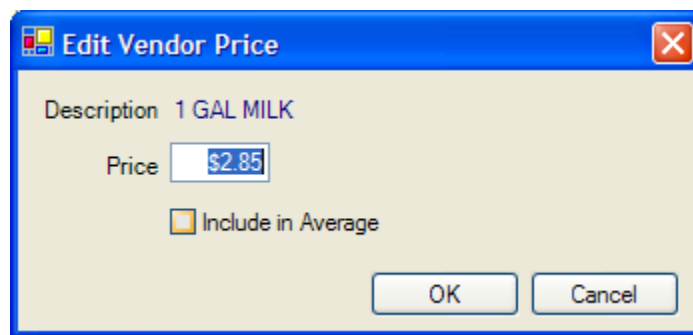


Figure 15 – Edit Vendor Price Dialog

##### 4.14.1 Controls

This section describes the behavior of the controls on the Edit Vendor Price dialog.

###### 4.14.1.1 Description Text and Value Label (Text)

This text label and value allows the user to view the descriptions individually, per item, within the Price Survey grid. The label will be visible and enabled when the Edit Vendor Price dialog is enabled. It will display the description of the item selected within the Price Survey grid on the Price Survey sub-tab. The value will be displayed in the inverse color of the dialog and will be read only.

###### 4.14.1.2 Price Masked Edit Box

This control will allow the user to enter the Vendor's price amount for the selected item. The masked edit box will be enabled when the Edit Vendor Price dialog is enabled. The edit box accepts the entry of numeric digits in the format of \$999.99. The value of the control will default to zero currency (\$0.00).

#### ***4.14.1.3 Include in Average Check Box***

This control will allow the user to indicate if they want to include the Vendor's Price in the calculation of the Peer Group Average Price. The check box will be enabled when the Edit Vendor Price dialog is active. When this control is selected with a checkmark, the user is requesting the system to include the Price, for the selected item, in the calculation for the Peer Group's Average Price. Upon initial entry this checkbox defaults to unchecked or to the previously saved value.

#### ***4.14.1.4 OK Button***

This control allows the user to instruct the system to save the Vendor's Price information and exit the Edit Vendor Price dialog. The OK button will be enabled when the Edit Vendor Price dialog is active. The Characteristics of the OK button are defined in the *Consistencies*.

#### ***4.14.1.5 Cancel Button***

This control allows the user to exit the Edit Vendor Price dialog without saving any changes. The Cancel button will be enabled when the Edit Vendor Price dialog is active. The Characteristics of the Cancel button are defined in the *Consistencies*.

### **4.14.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Edit Vendor Price dialog.

#### ***4.14.2.1 Initializing the Interface***

Upon the initial display of the dialog:

- The title bar will be set to "Edit Vendor Price".
- The Price control will default to \$0.00. All other controls will default to blank.

#### ***4.14.2.2 Edits***

Upon selection of the OK button:

- If an entry has not been made in the following control
  - Pricethe system will invoke a standard error message with the text "An entry is required in the <control label>."
- If the Price is \$0.00, the system will invoke a standard error message with the text "Price must be greater than 0."
- The system will save the Vendor Price information for the food item for the Vendor and the Vendor Price column will be populated.

- The Percent (+/-) column will be calculated from the Vendor Price divided by the Vendor Average Price. The result will be entered into the column as a percent over or under 100%.
- The Percent (+/-) column will be calculated from the Vendor Price divided by the Vendor Over Max Price. The result will be entered into the column as a percent over or under 100%.

#### **4.14.2.3 Cancel**

Upon selection of the Cancel button:

- The system will dismiss the Edit Vendor Price dialog without saving
- The system will return the user to the Price Survey sub-tab on the Food Pricing tab of the Vendor Folder.

#### **4.14.2.4 Data Map**

<b>Control Label</b>	<b>Entity</b>	<b>Attribute</b>
Description	FOODDISTRIBUTIONITEM	Description
Price	VENDORPRICES	VendorPrice
Include in Average	VENDORPRICES	IncludeInAvg



#### ***4.15.1.1 Food Basket Grid***

This control allows the user to view food item price information, food item description and quantity amounts for the vendor. The Food Basket grid will be enabled when the Food Basket sub-tab is active. This grid consists of the following five (5) columns:

- ID
- Quantity
- Description
- Vendor Price
- Peer Group Average Price

The grid will be sorted in ascending numeric order by the ID column. This grid will not have any other sorting abilities and has no selection other than highlighting a row. There will be horizontal/vertical scroll bars that will be displayed when the grid reaches the end to allow for additional lines now within the view area. The values within the grid are read-only.

##### ***4.15.1.1.1 ID Column***

The column will be enabled when the Food Basket grid is active. It will be read only and the ID will be displayed right aligned.

##### ***4.15.1.1.2 Quantity Column***

The column will be enabled when the Food Basket grid is active. It will be read only and the Quantity will be displayed right aligned.

##### ***4.15.1.1.3 Description Column***

The column will be enabled when the Food Basket grid is active. It will be read only and the Description will be displayed left aligned.

##### ***4.15.1.1.4 Vendor Price Column***

The column will be enabled when the Food Basket grid is active. It will be read only and the Vendor Price will be displayed right aligned.

##### ***4.15.1.1.5 Peer Group Average Price Column***

The column will be enabled when the Food Basket grid is active. It will be read only and the Peer Group Average Price will be displayed right aligned.

#### ***4.15.1.2 Vendor Price Text Label and Value (Amount)***

This control will display the sum of the Vendor Price column in the Food Basket grid. The label will be visible and enabled when the Food Basket sub-tab is active. The vendor price will display in the inverse color of the form and will be read only. The value is updated each time a vendor price is modified on the Price Survey sub-tab of the Food Pricing tab within the Vendor Folder. Otherwise, this value is initially blank.

#### *4.15.1.3 Peer Group Average Price Text Label and Value (Amount)*

This control will display the sum of the Peer Group Average Price column in the Food Basket grid. The label will be visible and enabled when the Food Basket sub-tab is active. The peer group average price will display in the inverse color of the form and will be read only. The value is initially blank.

#### *4.15.1.4 Percent Text Label and Value (Percentage)*

This control will display the percent, positive or negative, of the Vendor Price and the Peer Group Average Price. The label will be visible and enabled when the Food Basket sub-tab is active. The percentage will display in the inverse color of the form and will be read only. The value is initially blank.

### **4.15.2 Processing**

This section describes the processes (navigation) that take place as a result of the actions taken on the Food Basket sub-tab.

#### *4.15.2.1 Initializing the Interface*

Upon selection of the Food Basket sub-tab:

- The Food Basket sub-tab will be initially displayed 'on-top'.
- The Vendor Price column is filled with the food item prices for the Vendor. The Vendor Price label is the sum of the column.
- The Peer Group Average Price column is filled with the average food item prices. The value is displayed once the recalculation is completed for the Peer Group. The Peer Group Average Price label is the sum of the column.
- The Percent value displays the percent of the Vendor Price value divided by the Peer Group Average Price value. The value displays once the Vendor Price and Peer Group Average sums are populated. It will display as a percent over (+) 100% or percent under (-) 100%.
- The controls will default to the previously saved values as defined in the Data Map for this dialog.

#### *4.15.2.2 Edits*

There are no updateable controls on this sub-tab.